Comprizon™ Suite
Family of eProcurement and eBusiness Solutions

System Administration Manual

Version 7.7

Revision 2

CACI
EVER VIGILANT™

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REVISION HISTORY

DATE	VERSION	DESCRIPTION	AUTHOR
3/26/2004	7.3.003.1	First release for software version 7.3.003.	Jennifer Howard
3/30/2004	7.3.003.2	Added Vendor Management section; made minor revisions based on review comments.	Jennifer Howard
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INTRODUCTION

Welcome to the Comprizon™Suite System Administration Manual. The basis of CACI's eProcurement solution set, Comprizon Suite integrates and streamlines the entire acquisition management process from requisition through contract/purchase to order closeout. The strength of Comprizon Suite is the breadth of its procurement capabilities: it makes the transferring and processing of all necessary documents, data, and information seamless and efficient.

Comprizon Suite is platform independent and operates on Internet Explorer 5.5 or greater in multiple desktop environments (Windows, OS2, Mac OS, UNIX, etc.) and with a J2EE Web/application/database server combination. The user-friendly, Web-based environment of integrated modules allow requisitioners, managers, and financial and procurement personnel to track status from beginning to end.

At the core of Comprizon Suite is an extensible workflow management module used to administer the roles and workloads of system users. This flexible, highly customizable module notifies users through email when a new document is ready for processing, and sends the originator progress updates.

Comprizon Suite supports a variety of third-party applications (including Microsoft®, CAD, and WordPerfect®) and allows MS Windows™ objects to be attached to a requisition, solicitation, or award.

COMPRIZON SUITE MODULES

Comprizon Suite consists of four integrated modules. These modules function independently, but they combine seamlessly to manage the entire acquisition process. These four modules are described below. Figure 1 illustrates how the different modules encompass the acquisition process.

- **Comprizon™.Request** – provides Web requisitioning, routing for review and approvals, support documentation, real-time status checks, project plan development, and more.
- **Comprizon™.Bid** – supports electronic receipt of bid and proposal responses from offerors and automated input to solicitation line items.
- **Comprizon™.Award** – provides automated preparation and management of purchase requests, project plans, solicitations, amendments, contracts, and modifications, with options for PKI or server signing non-repudiation technologies.
- **Comprizon™.Bill** – offers tailored government off-the-shelf technology providing global invoice processing, receipt, acceptance, and authorization for payment.

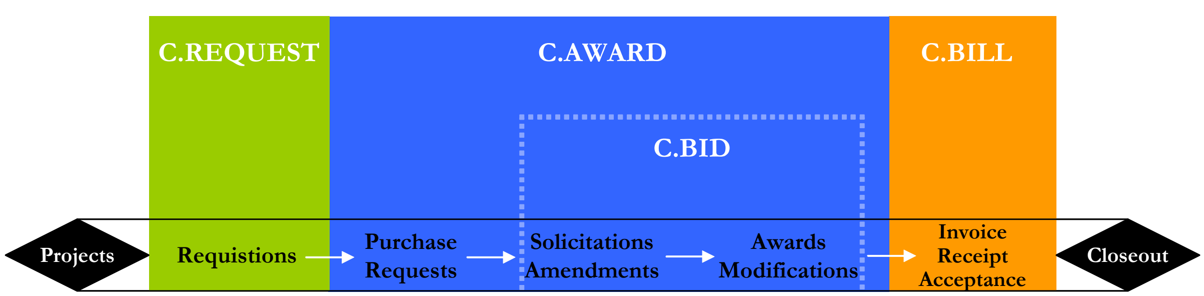

Figure 1. Comprizon Suite Modules in the Procurement Process

DOCUMENT CONVENTIONS

Notes, Tips, Examples, and Warnings

Notes, Tips, Examples, and Warnings within text (excluding those within tables) are separated from surrounding text by thin horizontal borders at the top and bottom and are preceded by the text type (“NOTE,” “TIP,” “EXAMPLE,” or “WARNING”). The following is an example:

EXAMPLE: This example shows the formatting for Notes, Tips, Examples, and Warnings.

Menu Path/Link Selection

Menu items, links, buttons, etc., that are to be selected and fields in which you enter data are highlighted in **bold** text. Each selection in a menu path is separated by the “ | ” character.

EXAMPLE: Select **File** | **New**.

Keyboard Keys

Keyboard keys are enclosed in less than (<) and greater than (>) symbols with the name of the key in **bold** text.

EXAMPLE: Press <**Enter**>.

Capitalization

The names of buttons, links, screens, etc., will be capitalized exactly as they appear on the screen.

ABOUT THIS MANUAL

This manual describes Comprizon Suite version 7.7 and is organized into the following chapters:

- **Introduction**. Introduces the features and benefits of ComprizonSuite and illustrates document conventions and organization.
- **Chapter 1 – Getting Started**. Provides information and tips for navigating the system and entering data.
- **Chapter 2 – Initializing the Database**. Describes the order in which the database must be initialized.
- **Chapter 3 – System Management**. Describes the use of the system management features, which allow you to configure sites and eVendor; maintain screen- and field-level help; create and

maintain PIIN formats, accounting formats, and security groups; view system action alerts; and maintain interface information.

- **Chapter 4 – Data Management.** Describes the data management features, which allow you to input the values for codes, addresses, etc., that are used in the Lookup screens and drop-down lists.
- **Chapter 5 – Acquisition Regulations.** Describes the maintenance of clauses and local matrices, as well as describes the process for updating acquisition regulations.
- **Chapter 6 – User Management**. Describes the user management features, which allow you to create and maintain system users.
- **Chapter 7 – Office Management**. Describes the office management features, which allow you to create and maintain office information.
- **Chapter 8 – Site Team Management.** Describes the site team management features, which allow you to create site teams, as well as maintain site team membership and permissions.
- **Chapter 9 – Credit Card Management**. Describes how to maintain credit card assignment records and how to import transaction statements from the financial institution.
- **Chapter 10 – Vendor Management.** Describes the management of vendor information.

Chapter 1

GETTING STARTED

IN THIS CHAPTER…

Browser and Third-Party Software Requirements

Comprizon Suite runs on Internet Explorer version 5.5 or greater in multiple desktop environments (Windows, OS2, Mac OS, UNIX, etc.). In order for Comprizon Suite to run properly, the browser must have Java and cookies enabled. The browser must also be configured to check for newer versions of pages either every time the page is visited or automatically. This setting can be found by selecting **Tools** > **Internet Options** in Internet Explorer, and then selecting the **Settings** button in the Temporary Internet Files section of the General tab.

In order to enjoy the full functionality of reports and forms, users should also have Adobe Acrobat or Acrobat Reader and Microsoft Excel. Also, any pop-up blockers should be turned off.

Launching Comprizon Suite

Comprizon Suite is accessed through Internet Explorer version 5.5 or greater. To launch Comprizon Suite, open your web browser, enter the Comprizon Suite URL address, and then press <**Enter**>.

Accessing the System Administration Module

When you access Comprizon Suite, the login screen shown in Figure 2 will display. To login, enter your User ID and Password. Next select the radio button for the appropriate module (C. Request, C.Award, C.Bid, or C.Bill), and then select **Submit**.

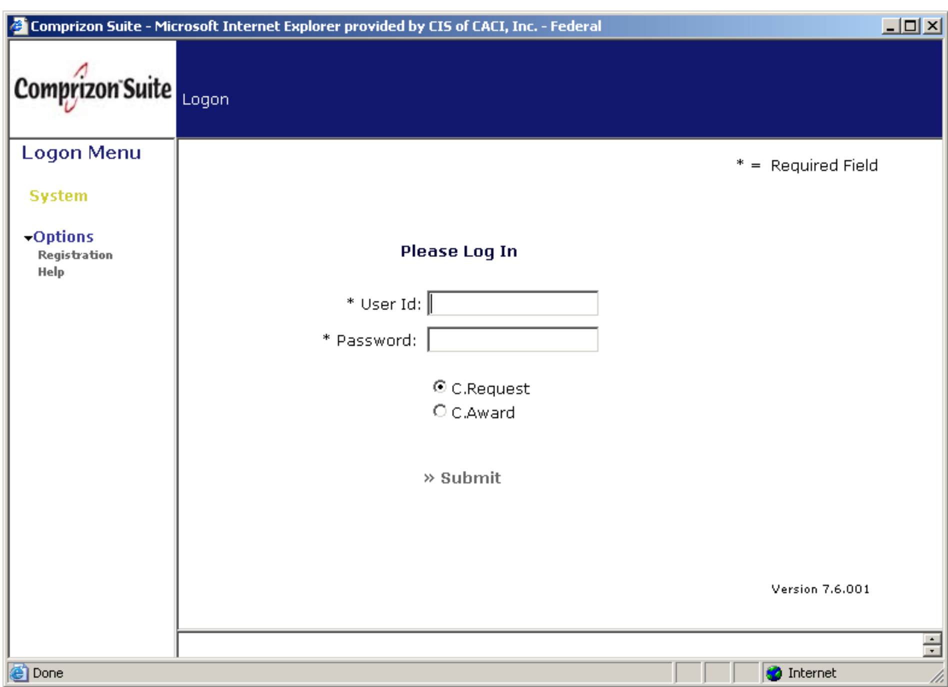

Figure 2. Comprizon Suite Login Screen

Once logged in, select **System Admin** from the Options menu. This will open the System Administration Menu.

NOTE: If you do not have System Administrator privileges, the System Admin option will not be available.

The System Administration Menu offers the following options and tools:

- System Mgmt
- User Mgmt
- Office Mgmt
- Team Mgmt
- Data Mgmt
- Acq Reg Mgmt (available when accessing from C.Award module)
- Update ACQ Reg (available when accessing from C.Award module)
- Upload ACQ File (available when accessing from C.Award module)

All system administration features and data table information apply to all modules within Comprizon Suite. You do not have to setup and maintain information for individual modules.

WEB BROWSER NAVIGATION

Once you have logged in, the system will display the Comprizon Suite Browser for the module you selected. The system by default will display your Most Recently Accessed Document screen.

Comprizon Suite screens contain the following areas, illustrated in the sample screen shown in Figure 3:

- Logo
- Standard Menu Bar
- Screen Title
- Main Frame
- Menu Frame
- Message/Note Frame

Figure 3. Web Browser Navigation

Standard Menu Bar

The Standard Menu Bar allows you to easily navigate to views/functions that are common to all users. These views/functions include the following:

- **Inbox** – allows you to view actions that have been routed to you for review and/or approval.
- **Hotlist** – provides links to procurement actions that you have marked for easy retrieval.
- **Recently Accessed** – lists the actions that you have accessed most recently.
- **Just In** – lists all of your newly assigned actions that have not yet been viewed.
- **Worksheet** – links you to the Worksheet, which allows you to search, filter, and open procurement actions for the module
- **User Profile** – allows you to administer and/or view your account information, including user information, preferences, addresses, authority, and warrants.
- **Action Alerts** – allows you to view action alerts you have received.
- **Help** – launches the Comprizon Suite online help.
- **Log Off** – logs you out of the system.

NOTE: Selecting an option from the Standard Menu Bar will remove you from the System Administration module. For additional information on the options available from the Standard Menu Bar, refer to the *Comprizon Suite User Manual*.

Screen Title

The Screen Title displays the name of the main screen you are currently viewing (e.g., Recently Accessed Documents, Requisition Administration). The Screen Title automatically adjusts as the Main Frame function/data changes.

In addition, the Screen Title also displays your First and Last name associated with your login ID, as they are entered in your user profile, and the document number and name for the action you are currently accessing, if applicable.

Main Frame

The Main Frame portion of the Comprizon Suite Browser displays the data for the Active Menu Link selected.

Menu Frame

The Menu Frame contains the menu options that provide access to specific procurement information areas. In an effort to keep your work area uncluttered, the Menu Frame adjusts to display only actions/tasks that are relevant to the work you are performing in the Main Frame.

These menu options are organized into various menus within the Menu Frame (see Figure 4).

NOTE: The menus and menu options available in the Menu Frame will vary depending on the module and the screen.

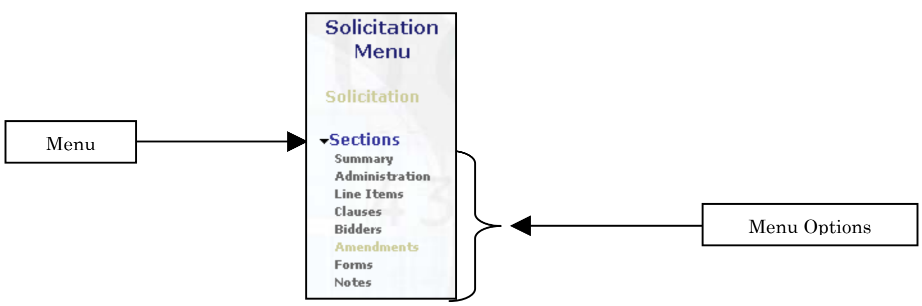

Figure 4. Menu Bar

Menus may be expanded or collapsed as necessary. An expanded menu displays the menu (e.g., Sections) and the subsequent menu options. A collapsed menu only displays the menu, while hiding the subsequent menu options.

To collapse a menu, single-click the expanded menu. The system collapses, or hides, all available menu options listed under that menu.

To expand a menu, single-click the collapsed menu. This will expand, or display, all of the available options listed under the Menu.

NOTE: Options that are not available for selection are displayed in gray text. You will not be able to access these options.

Message/Note Frame

The Message/Note Frame displays system messages for your review. For example, when deleting an action, you will be notified within the Message/Note Frame that the action was successfully deleted.

ADDITIONAL COMMON ELEMENTS

Hypertext Link

A Hypertext Link is another method used to access pertinent procurement information such as the Administration, Line Item, Routing, Terms & Conditions, etc.

Hypertext Links will be displayed in underlined blue or pink text (pink text indicates a previously accessed link). When mousing over a hypertext link, the cursor will change from a white arrow to a white hand. Single-click a link to select it.

Tabs

To make navigation for data entry and review easier, certain screens within Comprizon Suite are organized into tabs. The following figure illustrates a screen that is organized into tabs.

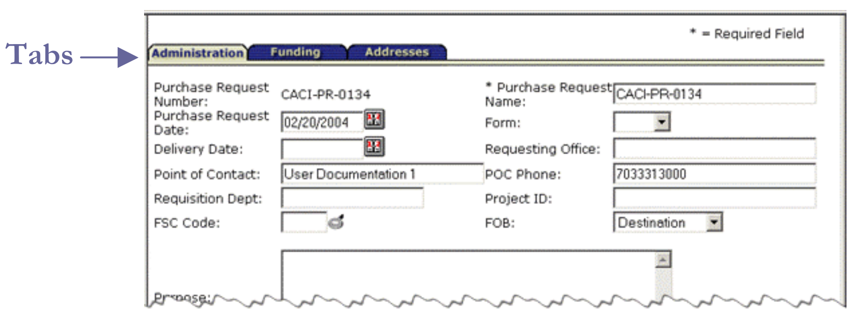

Figure 5. Tabs

Each tab will have different fields. Click a tab header to access these fields.

NOTE: Certain screens may have required fields in more than one tab. Therefore it is important to view all tabs within a screen to make sure you are entering all required information.

Drop-Down Lists

Drop-Down Lists are used to access pre-defined data lists applicable to the data field. Clicking the arrow will expand the list, thus allowing you to select the appropriate value for the field from the list.

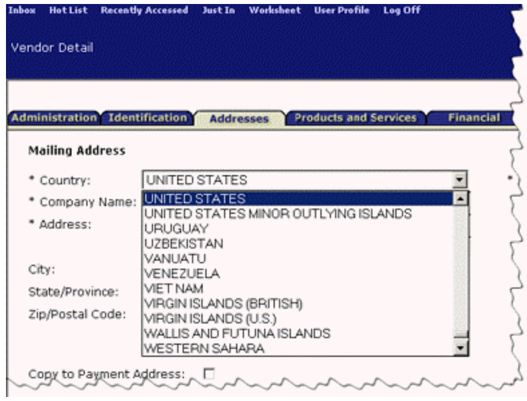

Figure 6. Drop-Down List

Radio Buttons

Radio buttons display a list of items and ensure that you only choose one option from a list, as illustrated below.

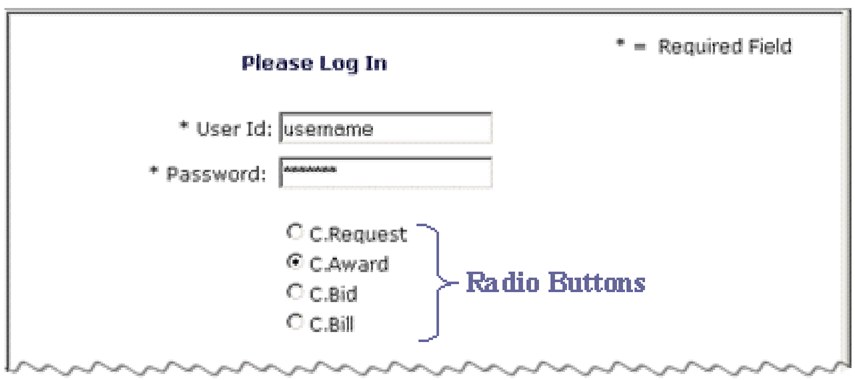

Figure 7. Radio Buttons

Checkboxes

Like radio buttons, checkboxes allow you to select values from a list. However, unlike radio buttons, more than one checkbox may be selected in a list, when appropriate.

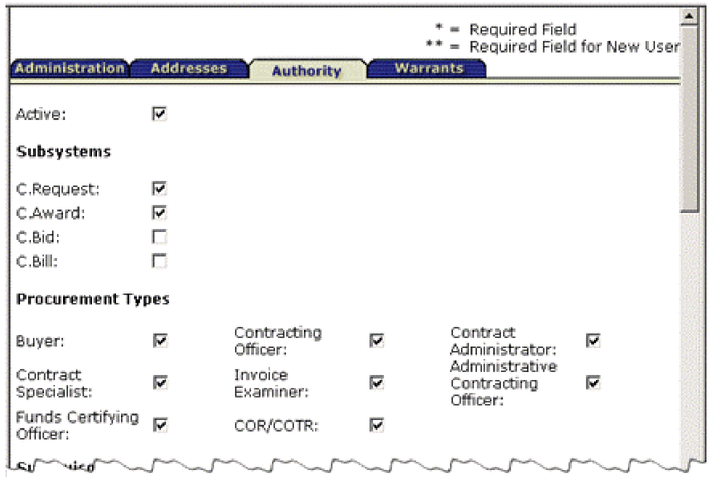

Figure 8. Checkbox

Lookup

Accessing the Lookup Screen

The Magnifying Glass icon identifies the Lookup feature found in certain fields. This feature allows you to quickly search for information or records for certain fields within the system (e.g., vendor or address code).

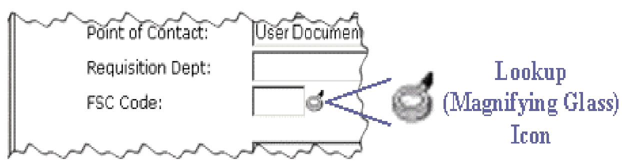

Figure 9. Magnifying Glass Button

Once you click the Lookup (Magnifying Glass) icon, the system displays a Lookup Screen. This screen allows you to enter search and filter criteria, perform a search, review a list of results, and select an entry in the results list.

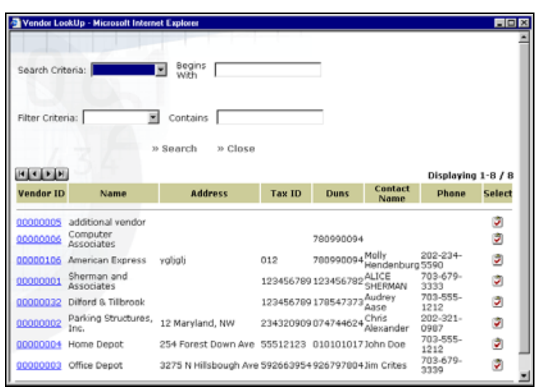

Figure 10. Lookup Screen

Searching for Entries

Searching for entries, if available on that Lookup screen, allows you to enter specific search criteria (specific values for specific fields) and then view all entries that meet that criteria. For example, you can enter a specific range for the Required Delivery Date and perform a search that only returns entries with Required Delivery dates that fall within that range.

Filtering Entries

Filtering allows you to filter entries in the results list based on text strings for available fields. For example, you may filter results based on a First Name that contains the text string "Ja", and search results will only list users with first names that contain this text (e.g., "James", "Janice", "Jason", etc.). All users that meet the search criteria will be displayed in the results list. Use the scroll buttons to navigate through the list.

Selecting Entries

The Select icon may be used to select an entry that has been returned when using the Lookup function. Clicking this button will enter the applicable information into the appropriate field(s) on the main frame.

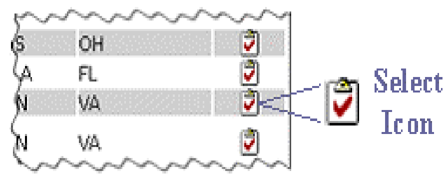

Figure 11. Select Icon

Calendar Button

The Calendar icon can be used to lookup and select a valid date from the Calendar Lookup Screen.

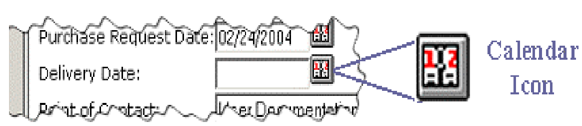

Figure 12. Calendar Button

To use the Calendar, click the icon. This will open the calendar screen, which by default shows the current calendar month. Click a date to select it. The Calendar provides the following buttons, which help you scroll through the Calendar.

[<<] – moves the Calendar to this month in the previous year. For example, if you are currently viewing April 2004, this button will move the Calendar to April 2003.

[<] – moves the Calendar to the previous month. For example, if you are currently viewing April 2004, this button will move the Calendar to March 2004.

[>] – moves the Calendar to this month in the next year. For example, if you are currently viewing April 2004, this button will move the Calendar to April 2005.

[>>] – moves the Calendar to the month. For example, if you are currently viewing April 2004, this button will move the Calendar to May 2004.

Free Form Text Field

Free Form Text fields are used to enter text in a field. These fields may have limits on the number of characters you can enter. If so, a character counter will display below the field, indicating the number of characters you have remaining (see Figure 13).

Figure 13. Free Form Text Field

Hover Help

Hover Help is used to identify the function of each appropriate toolbar icon within Comprizon Suite. Hover Help appears when you hold the cursor over an icon or specific text.

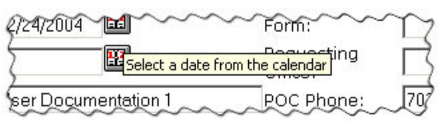

Figure 14. Hover Help

Command Button

Command Buttons will display on many screens within Comprizon Suite. The most commonly used command buttons that are displayed include Save, Apply, Reset, and Cancel.

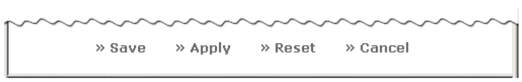

Figure 15. Command Buttons

Dialog Box (Message Screen)

A Dialog Box is used to present information and to allow you to respond. For example, the dialog box shown in Figure 16 will appear to ask you if you wish to save changes within the screen.

Figure 16. Dialog Box

Vertical Scroll Bars

Vertical Scroll Bars will display when there is not enough room vertically to display all of the information for that section. These bars will allow you to scroll down the screen as necessary.

Horizontal Scroll Bar

Horizontal Scroll Bars will display when there is not enough room horizontally to display all of the vendor data and/or record information for that section. These bars will allow you to scroll across the screen as necessary.

Navigational Arrows

The Navigational Arrows allow you to move through entries/pages. The following figure describes the Navigational Arrows.

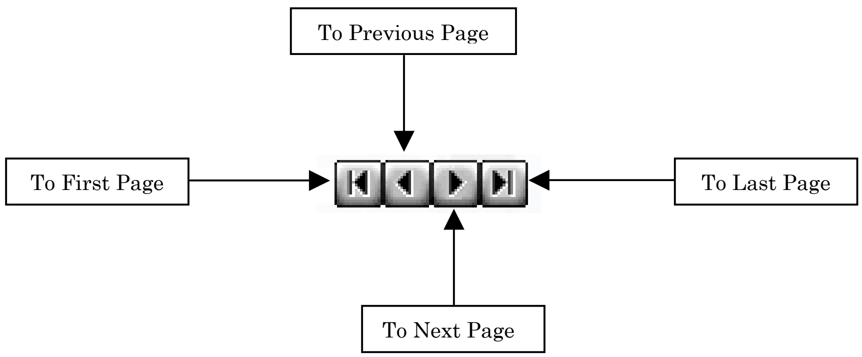

Figure 17. Navigational Arrows

Keyboard Keys

The following keyboard keys provide an alternative method for navigating between screen fields.

Table 1. Keyboard Navigation

Key	Navigation Action
<Tab>	The <Tab> key will move the cursor to the next enabled field in the screen.
<Shift + Tab>	The <Shift + Tab> keys will move the cursor to the previous enabled field in the screen.

SESSION TIMEOUT

The session timeout parameter for Comprizon Suite is 30 minutes. Comprizon Suite overrides the application/web server timeout parameter because users surfing non-secure web sites may have a different timeout than would be required for a secure site.

Chapter 2

INITIALIZING THE DATABASE

IN THIS SECTION…

ORDER OF INITIALIZATION

When initializing the Comprizon Suite database, the following areas of information must be initialized first in the order in which they are listed. This chapter provides instructions for entering this information. In addition, instructions for maintaining these areas of information are provided later in this manual beginning on the page indicated.

1. Accounting (also see page 64)
2. PIINs (also see page 51)
3. Addresses (also see page 74)
4. Office Management (also see page 130)
5. Site Configuration (also see page 29)
6. Interfaces (also see page 35)
7. Accounting Document Numbers (ADN) [GSA sites only] (also see page 60)
8. Warrants (also see page 95)
9. User Management (also see page 116)

After these areas have been initialized. The following areas can be initialized in any order.

- Security (see page 43)
- Screen Field Setup (see page 49)
- Courses (see page 80)
- Document Types (see page 82)
- Holidays (see page 86)
- Stock Items (see page 91)
- Route List Models (see page 96)
- Currency Codes (see page 103)
- Currency Rates (see page 105)
- Acquistion Regulations (see page 109)
- Personal Account Codes (see page 122)
- P-Card Approval List (see page 124)
- Team Management (see page 137)
- Credit Card Management (see page 141)
- Vendors (see page 145)

The following areas are already populated when you initialize. They may be edited as necessary.

- BOC Codes (see page 71)
- City-State Codes (see page 76)
- Country Codes (see page 79)
- FSC/PSC Codes (see page 84)
- Master Events (see page 87)
- NAICS (see page 90)
- Units of Issue (see page 93)

INITIALIZING ACCOUNTING INFORMATION

The System Administration module allows you to setup account codes for entire sites. Creating account codes consists of the following steps. Each step is described in greater detail in the following sections.

1. First create the account code segments. This consists of giving a segment a name and a length.
2. After creating an account code segment, possible values for the segment can be defined. Segment values can be added and maintained either before or after creating the accounting format.
3. After creating an account code segment, you can create the accounting format, which consists of a series of accounting segments. Creating accounting formats consists of defining the number of segments that will be contained in the format and then selecting what those segments will be.

After accounting formats have been defined, the System Administrator can set up account codes. Account codes are accounting formats for which specific values for the segments have been predefined.

Create Account Segments

The following steps descibe how to create the accounting code segments.

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Administration Menu.
2. Select **Segments** from the Accounting menu within the System Administration Menu. The Account Code Segments Management screen displays.
3. Select **Create** from the Actions menu. The Account Segment Detail screen displays.
4. Enter the **Segment Label Name** and the **Length**.
5. Select **Save**.

Add Account Segment Values

The following steps describe how to define the account segment values:

1. On the Account Code Segments Management screen, mark the checkbox for the Segment Label that needs defined values.
2. Select **Account Segment Value**. The Account Segment Value Management screen displays.
3. Select **Add** from the Actions menu. The Account Segment Values screen displays.
4. Enter each value for this segment on a separate field on the screen.
5. Select **Save** to save the values.

Create Account Formats

The following steps describe how to create account code formats:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Formats** from the Accounting menu. The Account Code Format Management screen displays.
3. Select **Create** from the Actions menu. The Account Format Detail screen displays. This screen consists of the following two tabs: Account Format and Segments.

4. Use the Account Format tab to enter the **Format Name** and use the drop-down list provided in the **Account Format** field to indicate the number of segments for the new format. If applicable, select the segment that will include the BOC from the drop-down list in the **BOC Segment** field.
5. After you have assigned the name and number of segments, use the Segments tab to assign the contents of each segment by selecting the correct value for each segment from the corresponding drop-down list.
6. Select **Save** to save the account format.

INITIALIZING PIINS

PIINs (Procurement Instrument Identification Numbers) are unique numbers that are used to identify requisitions, purchase requests, solicitations, amendments, awards, and modifications. PIINs may be auto-generated by the system or assigned manually by the user (if allowed in the System Administration settings). The options in the PIINs & Numbers menu within the System Management Menu allow you to configure the format of auto-generated PIINs, including the segment values and counter codes.

Setting up an auto-generated PIIN format consists of the following steps. Each step is described in greater detail in the following sections.

1. First configure the PIIN segments. This consists of giving a segment a name and a length, and then entering the possible values for the segment, which will appear in the drop-down list for the segment when the user is creating the PIIN.
2. Next create the format for a particular document type by selecting the number of segments that will be contained in the PIIN and then selecting the contents of each segment.
3. The third step is to define the counters for the counter codes.

Configure PIIN Segments

Configuring PIIN segments allows you to create the label name, length, and values for PIIN segments. The following steps describe how to configure PIIN segments.

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Segments** from the PIINs & Numbers menu. The PIIN Segment Value Management screen displays.
3. To create a new PIIN segment value select **Create** from the Actions menu. The PIIN Segment Values screen displays. This screen consists of the following two tabs: Label Name and Value List.
4. To create a new PIIN segment value, first enter the **Segment Label Name** and the **Length** (i.e., number of characters) on the Label Name tab.
5. Next open the Value List tab to define the values that will be available to the user in the segment's drop-down list when assigning the PIIN. Enter each available value in a separate box, and then mark the radio button for the default value for that segment.
6. Select **Save** to save the new PIIN segment.

NOTE: You will need to create segments for every part of your PIINS that will be setup in the database except for Fiscal Year. Examples of segments could include activity code, micropurchase office, purchasing office, requesting office, codes for award types, etc.

Configure PIIN Formats

A PIIN is a collection of PIIN segments that is assigned to particular document type. The following steps describe how to configure PIIN formats:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Formats** from the PIINs & Numbers menu. The PIIN Format Management screen displays. This screen lists all of the different document types, along with the current PIIN format assigned for that document type.
3. Select the document type in this list. This will open the PIIN Format Detail screen. This screen consists of the following three tabs: Set PIIN, Segments, and Counter Segment Labels. Table 2 provides descriptions of and instructions for the fields on this screen.
4. First, use the SET PIIN tab to set the length (number of segments) of the PIIN. PIINs may consist of a maximum of eight segments This screen also allows you to indicate which segments of the PIIN, if any, will contain the Fiscal Year, Counter Code, and Counter, as well as to define the Free Form Length and Counter Length.
5. After defining the number of segments in the PIIN, the next step is to use the Segments tab to define the contents of each segment. Each segment number will correspond to a drop-down list that contains the possible values for that segment. Select the appropriate Segment Label from the list for each segment.
6. If one of the segments has been defined as a Counter Code, then use the Counter Segment Labels tab to select the label that displays in the system for the PIIN's counter code segment, by selecting a label from the drop-down list.
7. When you have finished, select **Save** to save changes to the PIIN format.

NOTE: If you select any format other than Free Form, you must include a counter code and counter in the format.

Table 2. PIIN Format Detail Screen Field Descriptions

Field	Description
Set PIIN Tab	
Document Type	Displays the Document Type to which this PIIN format applies. This is the document type you selected from the list on the PIIN Format Management screen.
PIIN Format	Select the number of segments that will be included in this PIIN.
Fiscal Year	Indicates the segment in which the fiscal year will appear. Select the segment number from the drop-down list; select zero to indicate that the fiscal year will not be included in the PIIN.
Counter Code	Indicates the segment number in which the counter code will appear. Select the segment number from the drop-down list provided; if it is a free-form format, you can select zero from the list to indicate that the counter code will not be included in the PIIN.
Counter	Indicates the segment number in which the counter will appear. Select the segment number from the drop-down list provided; if it is a free-form format, you can select zero from the list to indicate that the counter will not be included in the PIIN.
Free Form Length	When the document type is Free-Form, enter the maximum length (up to 25 characters) for the PIIN that users can enter. **NOTE**: Fiscal Year, Counter Code and Counter will each be zero when the PIIN format is Free-Form.

Counter Length	Enter the number of digits in the counter. **NOTE**: The total length of the PIIN cannot exceed 25 characters.
Segment Tab	
Segment # column	Indicates the segment number defined by the corresponding drop-down list.
Segment Label column	Use this drop-down list to define the value for this segment.
Length column	Displays the number of characters in this segment.
Update column	Marking this checkbox means that when the user is assigning a PIIN, the user will be able to either select a value from the predefined list for a particular segment or manually enter another value for that segment. If the checkbox is not marked, then the user must pick the value for that segment from the predefined list.
Counter Segment Labels Tab	
Document Subtype column	Displays the Document Subtypes for the document type you selected. The adjacent Counter Segment Label and Length describe the counter for the corresponding Document Subtype
Counter Segment Label	Use this drop-down list to define the value for this segment.
Length	Displays the number of characters in this segment.

Define PIIN Counters

The following steps describe how to define PIIN counters:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Counters** from the PIINs & Numbers menu to manage counter codes. The PIIN Counter Code Management screen displays.
3. To create a new PIIN counter, select **Create** from the Actions menu. The PIIN Counter Detail screen displays. This screen consists of the following two tabs: Counter Type and Counter Detail.
4. To create the counter, first select the **Counter Type** from the drop-down list on the Counter Types tab. Next open the Counter Detail tab and enter the information as described in Table 3.
5. Select **Save** to save changes.

Table 3. PIIN Counter Details Screen (Counter Detail Tab) Field Descriptions

Field	Description
Fiscal Year	Enter the last two digits of the fiscal year (e.g., “04”).
Counter Code	Select the appropriate Counter Code from the drop-down list provided.
Counter Code Value	Enter the Counter Code Value, or use the Lookup (Magnifying Glass) to search for and select the appropriate value for the Counter Code. The valid values will vary based on the Counter Code selected in the previous field.
Next Counter Number	The system displays the next PIIN Counter that will be used when the user assigns a PIIN to a document with this Fiscal Year and counter code. This allows the System Administrator to define where a particular counter should begin.

INITIALIZING ADDRESSES

The Addresses option found in the Options menu within the Data Management Menu allows you to input the addresses information that will be used in lookups throughout the system (Purchase For, Offer To, Deliver To, Ultimate Destination, Contracting Office, Issued By, Admin By, Invoice To, Payment Office). Selecting this option will open the Addresses Mgmt screen.

The following steps describe how to create a new address,:

1. From the Purchasing/Contracting Main menu select **System Admin** > **Data Mgmt**. This will open the Data Management Menu.
2. Select **Create** from the Addresses menu on the Addresses Mgmt screen. This will open the Addresses Detail screen.
3. To create the address, enter the information as described in Table 4.
4. Select **Save**.

Table 4. Address Detail Screen Field Descriptions

Field	Description
Code	Enter the unique code that will identify this address.
Active	Mark this checkbox if you wish the address to become active upon creation (i.e., available to the user in lookups). Unmark the checkbox if you wish the address to remain inactive after it is created.
Country	Select the appropriate country from the drop-down list provided.
Address Format	Select the appropriate address format from the drop-down list provided to indicate how the data will display on the screen and how it will be printed.
Office/Branch	Enter the name of the office or branch.
Address	Enter the address. Two lines are provided for entering the data.
City	Enter the city, or use the Lookup (Magnifying Glass) to search for and select the city.
State/Province	Enter the two-letter abbreviation for the state/province, or use the Lookup (Magnifying Glass) to select the state.
Zip/Postal Code	Enter the zip code or postal code.
Point of Contact	Enter the name of the main Point of Contact for this address.
Phone Number	Enter a telephone number for the address.
Fax Number	Enter a fax number for the address.

INITIALIZING OFFICES

The following steps describe how to initialize offices:

1. From the Purchasing/Contracting Main menu select **System Admin** > **Offices**. This will open the Office Management screen.
2. To create a new office record, select **Create** from the Actions menu. The Office Administration screen displays. This screen consists of the following four tabs: Administration, Defaults, Addresses, and Surcharge.
3. To create the new office record, enter information on this screen as described in Table 5.
4. Select **Save** to save the office information.

Table 5. Office Administration Screen Field Descriptions

Field	Description
Administration Tab	
Office	Enter the name for the office.
Account Format	Select the account format from the drop-down list provided.
Activity Code	Enter the activity code.
Site ID	Enter the site ID. This site ID will be used for tracking Accounting Document Numbers (ADN).
Defaults Tab	
NOTE: This tab consists of three sections (Requisition Defaults, Purchase Request Defaults, and FOIA Defaults). Each section contains the fields described below.	
Number Prefix	Enter the number prefix (i.e., characters that will begin before the number).
Begin Counter	Enter the number at which the counter will begin.
End Counter	Enter the number at which the counter will end.
Sample Number	This field displays a sample number based on the Number Prefix, Begin Counter, and End Counter.
Addresses Tab	
Purchase For	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address.
Offer To	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address.
Deliver To	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address.
Ultimate Destination	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address.
Contracting Office	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address.
Issued By	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address.
Admin By	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address.
Invoice To	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address.
Payment Office	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address.
Surcharge Tab	
Surcharge Rate	Enter the surcharge rate.
Minimum Amount	Enter the minimum amount.
Maximum Amount	Enter the maximum amount.
Revenue Account	Enter the revenue account either manually or by using the Lookup (Magnifying Glass) to search for and select the appropriate value.

INITIALIZING SITE CONFIGURATION

The following steps describe how to initialize the site configuration:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. To access the Site Configuration screen, select **Site Configuration** from the Options menu. This screen consists of the following five tabs: Information, Preferences, Passwords, Addresses, and Validations. To manage site configurations,
3. Enter and/or edit the data as described in Table 6.
4. Select **Save** to save changes..

Table 6. Site Configuration Screen Field Descriptions

Field	Description
Information Tab	
Comprizon.Suite Version	This field displays the version of Comprizon.Suite currently installed on the system, as well as the official release date for the version currently installed.
Contracting Office Code	Enter the appropriate code for the site's contracting office.
Contracting Office Name	Enter the name for the site's contracting office.
FIPS 95 ID Number	Enter the FIPS 95 ID Number for the site.
Value Added Tax Rate	Enter the Value Added Tax Rate.
Micro-Purchase Limit	Enter the maximum dollar amount for a micro-purchase.
Preferences Tab	
OCONUS Designation	Select either "OCONUS" or "CONUS" from the drop-down list. Selecting OCONUS indicates that foreign currency is used.
Enable Warrant Tracking	Select either "Yes" or "No" from the drop-down list.
Enable Account Document Number Tracking	Select either "Yes" or "No" to indicate if the system should allow the use of Account Document Numbers (ADN).
Number of Lines to display per Page	Enter the appropriate value for the number of lines that displays for all users on lists and worksheets.
Recently Accessed Work	Enter the number of days that will display on the Recently Accessed Work screen.
Enable COR/COTR certification tracking	Select either "Yes" or "No" to indicate if the system should track COR/COTR certification.
Display COR/COTR	Select either "Yes" or "No" to indicate if the system should display COR/COTR active/inactive notices.

active/inactive notices	
Solicitation Issued	Select "Yes" or "No" to indicate if the system should send an automatic action alert for the contract specialist and, if applicable, the PR Buyer when a solicitation is issued.
Award Issued	Select "Yes" or "No" to indicate if the system should send an automatic action alert for the contract specialist, COTR, and, if applicable, the PR buyer when an award is issued.
Contract Deliverables	Select "Yes" or "No" to indicate if the system should send an automatic action alert to the COTR, contract specialist, and, if applicable, the PR buyer to notify them of contract deliverables that are overdue. Note that if the deliverable is associated with a requisition, the alert will be sent to the requisition's buyer. The alert will be sent on the day the deliverable is due.
COTR Recertification	Select either "Yes" or "No" to indicate if the system should send an automatic action alert for COTR recertification. If you select Yes, then you will need to enter a number in the adjacent text box that appears for the number of days prior to the Certification Period End Date that the alert should be sent.
Solicitation Closed	Select "Yes" or "No" to indicate if the system should sent an automatic action alert to notify the contract specialist associated with the solicitation and, if applicable, the PR buyer that a solicitation is nearing it's end date. For this alert type, you must enter a number for the number of days prior to the close of the solicitation that the alert will be sent.
Award Expiration	Select "Yes" or "No" to indicate if the system should sent an automatic action alert to notify the contract specialist, CO, COTR, the owner of the award, and, if applicable, the PR buyer that an contract is approaching the expiration date. For this alert type, you must enter a number for the number of days prior to the contract expiration that the alert will be sent. Note that the system allows users to update and delete Contract Expiration action alerts that are created automatically by the system. For example, a user who is associated with a base contract may not want to receive action alerts for delivery orders, BPA calls, etc.
Period of Performance	This alert indicates that a period of performance is nearing its end date. You may elect to not send an alert, to send one alert, or to send two alerts. If you elect to sent alerts, you must enter the number of days prior to the end of the period of performance that the alert should be sent and, if applicable, resent.
Support Documents	This field displays the directory where support documents are stored.
Passwords Tab	
Login Password Section	
Minimum Length	Enter the minimum number of characters for a login password.
Numeric Required in Password	Select "Yes" or "No" to indicate if login passwords must include numeric characters.
Expiration	Enter the number of days that a login password will be valid. Enter zero to indicate that passwords will not expire.
Days Prior to Expiration	Enter the number of days prior to the expiration of a login password that a notice will be sent informing the user that the password is about to expire.
Repeat Maximum	Enter the number of new passwords that must be used before a password can be reused. For example, if a user's password is "xxx123" and the Repeat Maximum is 5, then the user must use five other passwords before they are allowed to use "xxx123" again.
Invalid Characters	Enter characters that are not allowed in a login password.
Login Attempts	Enter the number of times that a user may attempt to login before the system either locks out the user who is using a valid user ID or displays the User Profile Administration screen for unrecognized user IDs. If on the last allowed login attempt, the user enters an incorrect password for a valid user ID, then the user is notified that the user ID has been deactivated,

	and they must contact the system administrator. If on the last attempt the user enters an invalid user ID, then the user is presented with the User Profile Administration screen.
Signature Password Section	
Minimum Length	Enter the minimum number of characters for a login password.
Numeric Required in Password	Select "Yes" or "No" to indicate if login passwords must include numeric characters.
Expiration	Enter the number of days that a login password will be valid. Enter zero to indicate that passwords will not expire.
Days Prior to Expiration	Enter the number of days prior to the expiration of a login password that a notice will be sent informing the user that the password is about to expire.
Repeat Maximum	Enter the number of new passwords that must be used before a password can be reused. For example, if a user's password is "xxx123" and the Repeat Maximum is 5, then the user must use five other passwords before they are allowed to use "xxx123" again.
Invalid Characters	Enter characters that are not allowed in a login password.
Addresses Tab **NOTE**: These addresses are the site default addresses that will be used when a user creates a procurement document.	
Purchase For	Enter the address code manually, or use the Lookup (Magnifying Glass) to search for and select an address.
Offer To	Enter the address code manually, or use the Lookup (Magnifying Glass) to search for and select an address.
Deliver To	Enter the address code manually, or use the Lookup (Magnifying Glass) to search for and select an address.
Ultimate Destination	Enter the address code manually, or use the Lookup (Magnifying Glass) to search for and select an address.
Contracting Office	Enter the address code manually, or use the Lookup (Magnifying Glass) to search for and select an address.
Issued By	Enter the address code manually, or use the Lookup (Magnifying Glass) to search for and select an address.
Admin By	Enter the address code manually, or use the Lookup (Magnifying Glass) to search for and select an address.
Invoice To	Enter the address code manually, or use the Lookup (Magnifying Glass) to search for and select an address.
Payment Office	Enter the address code manually, or use the Lookup (Magnifying Glass) to search for and select an address.
Validations Tab	
Award Type-Field Name column	This column displays various fields for which information is entered when creating an award.
Mandatory Column	Select "Yes" or "No" to indicate if the corresponding award type-field name is mandatory. Mandatory fields must be filled in before an award can be issued.

INITIALIZING INTERFACES

The Interfaces option within the Options menu allows you to manage the information necessary for interfacing with FPDS-NG, BPN, Fed Biz Opps, and Web Solicitations.

- Federal Procurement Data System – Next Generation (FPDS-NG) replaces FPDS as the Government's new consolidated procurement reporting system for collecting, editing, and validating contract reporting data across the entire Federal Government. The purpose of the FPDS-NG is to enhance the FPDS to lower the government-wide cost of operations, enhance responsiveness to customer needs, enable data collection and data sharing directly from agency electronic commerce systems, and improve the quality of and time required for collecting information.

  The new FPDS-NG System is a web-based system which will allow all Government procurement officials to report their award data on-line directly to a consolidated entry point. Comprizon Suites System Administration module allows you to manage the login information for FPDS-NG.

- Business Partner Network (BPN) is the Federal Government's single source for gathering vendor data for grantees, Federal entities, and companies seeking to do business with the Federal government. The BPN is a search mechanism that provides of information for buyers and sellers including Equal Employment Opportunity compliance checks, size status, the Excluded Parties Listing System, past performance evaluations, etc.

  Using the System Administration module, you may specify if users must locate new vendors via BPN, if awards may only be given to BPN vendors, or if lookups will display only BPN vendors.

- Federal Business Opportunities (Fed Biz Opps, or FBO) is a single point of entry for Federal buyers to publish Federal business opportunities. Vendors can find the posted items for a spectrum of Federal departments and agencies.

  Comprizon Suite allows procurement officials to publish electronic procurement business opportunities information entered into Comprizon from the purchase request, solicitation, and award. The system creates a text file that can be submitted by the System Administrator directly to the FedeBizOpps interface. Comprizon exports and appends each user's electronic submission in the data exchange formats established by the FedBizOpps system, using the current FedBizOpps interface templates.

- The Web Solicitations module allows for the publishing of solicitations and other documents, as well as allows vendors to post their responses to these opportunities. This module consists of three separate portions, including Comprizon Suite user and administrator functions, Biz Doc for the storing of documents, and eVendor to notify vendors of opportunities and to allow them to post responses.

The following steps describe how to manage interfaces:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Interfaces** from the Options menu. This will open the Interface Configuration screen, which consists of the following three tabs: FPDS-NG, BPN, and Fed Biz Opps.
3. Enter or edit the information as described in Table 10 and then select **Save**.

Table 7. Interface Configuration Screen Field Descriptions

Field	Description
FPDS-NG Tab	
FY04 Reporting (FPDS-NG)	Select either “Yes” or “No” from the drop-down list.
FPDS-NG URL	Enter the FPDS-NG URL, being sure to include the “http://”.
FPDS-NG System Login	Enter the FPDS-NG login ID for the system.
FPDS-NG System Password	Enter the FPDS-NG system login password.
FPDS-NG Username	Enter your FPDS-NG username. This username will be used when users do not have individual usernames.
BPN Tab	
New Vendors must be located via BPN	Select either “Yes” or “No” from the drop-down list to indicate if any new vendors must be located using BPN.
Allow awards only to BPN vendors	Select either “Yes” or “No” from the drop-down list if awards may only be made to vendors in the BPN.
Display only BPN vendors in Vendor Lookups	Select either “Yes” or “No” from the drop-down list to indicate if only BPN vendors should be displayed when users search for vendors.
Fed Biz Opps Tab	
CBAC	Enter the contracting office’s Billing Account Code. The CBAC consists of nine alphanumeric characters. The first three characters are GPO; the following 6 characters are the site’s numeric account number. The value entered in this fill-in field will default into Item 4 in all Fed Biz Opps synopses. This field may not be blank. If a site uses more than one CBAC, the user may manually update the code after it has defaulted into a synopsis record.
Contract Office Zip Code	Enter the zip code for the contracting office. This value will be the default; the user may update this field as necessary.
Contract Office Address	Enter the default address for the contracting either by manually entering the address code or by using the Lookup (Magnifying Glass) to search for and select the proper address. The user may update this information as necessary.
Submit to FBO E-mail Address	If desired, enter the default e-mail address for submitting the synopsis. The user may update this information as necessary.
Submit to FBO File Directory	If desired, enter a default directory. If a directory is entered, all synopses submitted from the will be written to a specific file (this file is automatically created each day) in this directory. If this field is left blank, users will be prompted when submitting each synopsis to specify the location and file.
Web Solicitation Tab	
System ID	Enter the system ID.
Biz Doc URL	Enter the URL for Biz Doc.

Initializing Warrants

The following steps describe how to create warrant levels:

1. From the Purchasing/Contracting Main menu select **System Admin** > **Data Mgmt**. This will open the Data Management Menu.
2. Select **Warrants** from the Options menu. This will open the Warrants Mgmt screen.
3. Select **Create** from the Warrants menu. This will open the Warrants Detail screen.
4. Enter the **Level** name. Next enter the maximum dollar amount in the **Amount** field. If desired, you may also enter any comments in the Limitation/Comments field. Next confirm that the Active checkbox is marked if you wish for the warrant level to become active upon creation. Active levels will be displayed in Lookups.
5. When you have finished, select **Save**.

Initializing Users

The following steps describe how to create user accounts:

1. From the Purchasing/Contracting Main menu select **System Admin** > **User Profiles**. This will open the User Profile List screen.
2. To create a new user select **Create** from the Actions menu on the User Profile Management Menu. The User Profile Administration screen displays. This screen consists of the following five tabs: Administration, Addresses, Authority, Certification, and Warrants.
3. To create the new user, enter the information as described in the table below.
4. Select **Save** to save the user account.

Table 8. User Profile Administration Screen Field Descriptions

Field	Description
Administration Tab **NOTE:** With the exception of the Code, the user may use the My Profile option in any of the Comprizon Suite modules to edit this information.	
Code	Enter a unique three-character user code for the user. Once a code is entered, it may not be edited by either the System Administrator or by the user.
First Name	Enter the user's first name.
Last Name	Enter the user's last name.
Title	Enter the user's title.
Phone Number	Enter the user's phone number.
Fax Number	Enter the user's fax number.
Other Number	Enter another phone number.
Office	Select the office from the drop-down list provided.
E-mail Address	Enter the e-mail address for the user.

Addresses Tab **NOTE: T**he user may use the My Profile option in any of the Comprizon Suite modules to edit this information.	
Contracting Office	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address. Note that any information entered in this field will take precedence over site and office addresses when the user account is created.
Purchase For	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address. Note that any information entered in this field will take precedence over site and office addresses when the user account is created.
Deliver To	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address. Note that any information entered in this field will take precedence over site and office addresses when the user account is created.
Ultimate Destination	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address. Note that any information entered in this field will take precedence over site and office addresses when the user account is created.
Issued By	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address. Note that any information entered in this field will take precedence over site and office addresses when the user account is created.
Offer Due	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address. Note that any information entered in this field will take precedence over site and office addresses when the user account is created.
Admin By	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address. Note that any information entered in this field will take precedence over site and office addresses when the user account is created.
Invoice To	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address. Note that any information entered in this field will take precedence over site and office addresses when the user account is created.
Payment Office	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address. Note that any information entered in this field will take precedence over site and office addresses when the user account is created.
Authority Tab	
Active	Mark this checkbox to indicate that the user account will be active upon creation. Unmark the checkbox if you wish for the account to remain inactive after creation. Inactive users do not display in lookups and cannot login to the system.
Subsystems section	Mark the checkboxes for all modules that the user will have permission to access.
Procurement Types section	Mark the checkboxes for all roles that the user will have in the system. This field prevents users from receiving submitted documents or being assigned as the CO/COTR on awards if they have not been assigned that role.
Supervisor section	Enter the user codes, or use the Lookup (Magnifying Glass) to search for and select the user codes, for the user's Supervisor and for alternates that have the authority to review or approve actions when the user is unavailable. Supervisors are allowed to assign, unassign, and reassign the user's workload.
Logon ID	Enter the Login ID that the user will use to login to the system. The user may edit this field.
Current Password	Enter the password that the user currently uses to login to the system.
New Password	If applicable, enter a new login password in this field. Users may assign their own passwords.
Confirm Password	If you have entered a new password, re-enter that new password here.
Current Signature Password	The user's current signature password displays in this field.

Create Blank Signature Password	If you wish the new signature password to be blank, the mark the checkbox in this field. Users may assign their own passwords.
New Signature Password	To create a new signature password, enter the new password in this field. Users may assign their own passwords.
Confirm Signature Password	If you have entered a new signature password, then re-enter the new password here.
Procurement Types section	Mark the checkbox for all procurement types that are should be available to the user.
Certification Tab	
Level	Select the appropriate certification level from the drop-down list provided.
Date Assigned	After you have selected the certification level, enter the date the level was assigned either manually in the MM/DD/YYYY format, or use the Calendar to search for and select a date.
Warrants Tab	
Default Warrant Level	Select the warrant level from the drop-down list provided, and then enter a date that the warrant level becomes effective (MM/DD/YYYY format), or use the Calendar to search for and select the date.
Contract Type column	This column displays the different types of contracts for which the user is authorized to be the Contract Officer.
Level column	Select the warrant level for the corresponding contract type from the drop-down list.
Date Assigned column	Enter the date that the warrant level for the corresponding contract type becomes effective (MM/DD/YYYY format), or use the Calendar to search for and select a date.
Comments	Enter any comments. A counter below the field indicates the number of characters you have remaining for your comment.

Chapter 3

SYSTEM MANAGEMENT

IN THIS SECTION…

System Management Overview

The System Management Menu allows you to configure system parameters, enter and update custom screen and field help, manage security groups and interface information, and define PIIN formats and accounting options.

Options

Site Configuration

Site configuration settings allow you to control system information, FPDS and BPN information, password requirements, addresses, and mandatory award fields for the site. The following steps describe how to maintain site configuration settings:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Site Configuration** from the Options menu. This screen consists of the following five tabs: Information (Figure 18), Preferences (Figure 19), Passwords (Figure 20), Addresses (Figure 21), and Validations (Figure 22).
3. Enter and/or edit the data as described in Table 9.
4. Select **Save** to save changes.

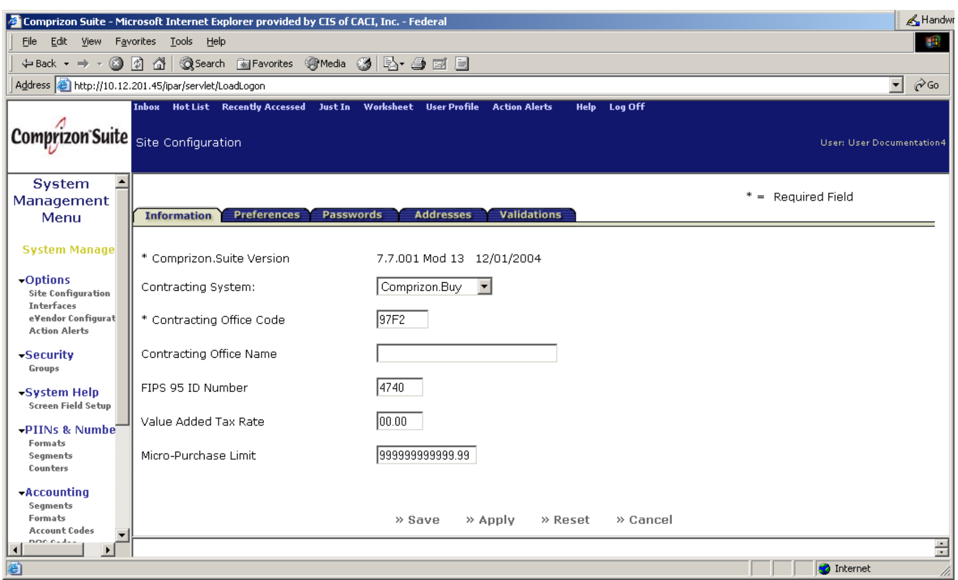

Figure 18. Site Configuration Screen - Information Tab

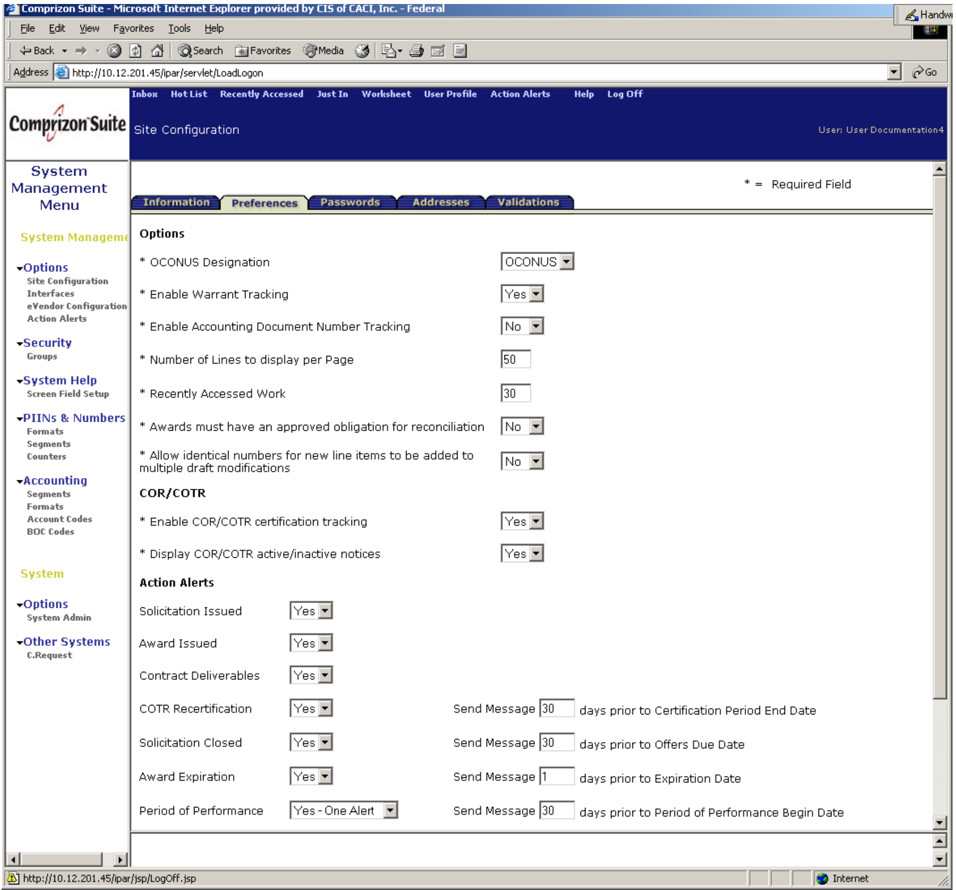

Figure 19. Site Configuration Screen - Preferences Tab

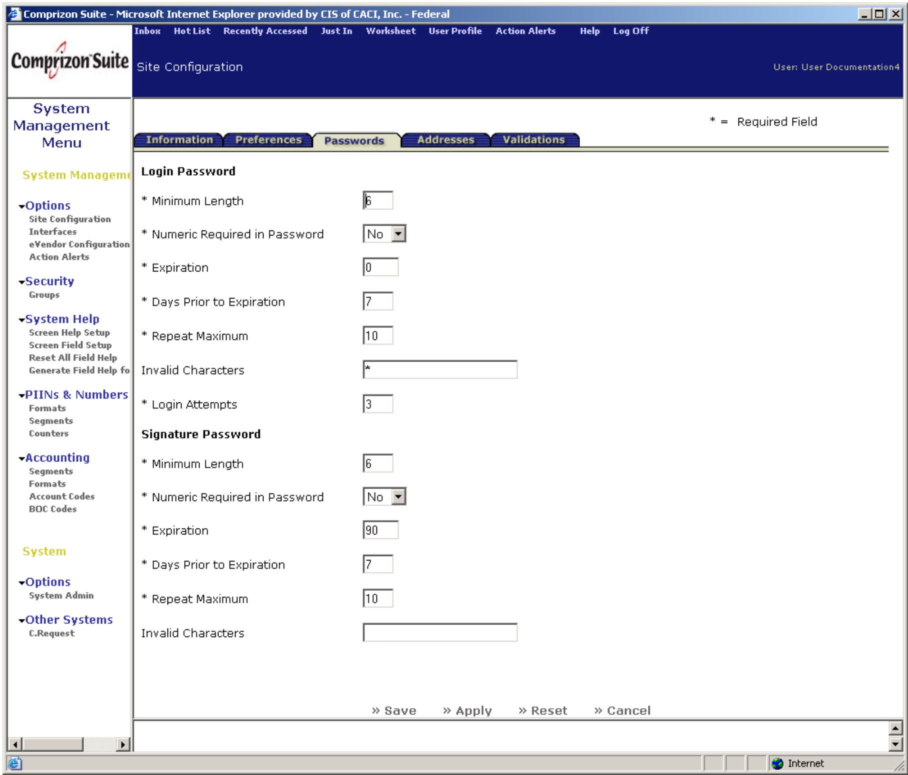

Figure 20. Site Configuration Screen - Passwords Tab

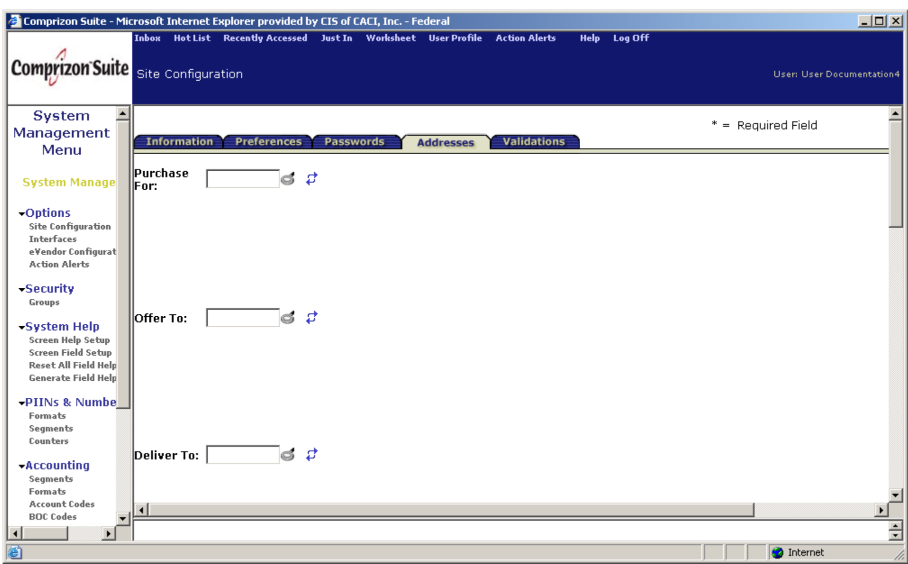

Figure 21. Site Configuration Screen - Addresses Tab

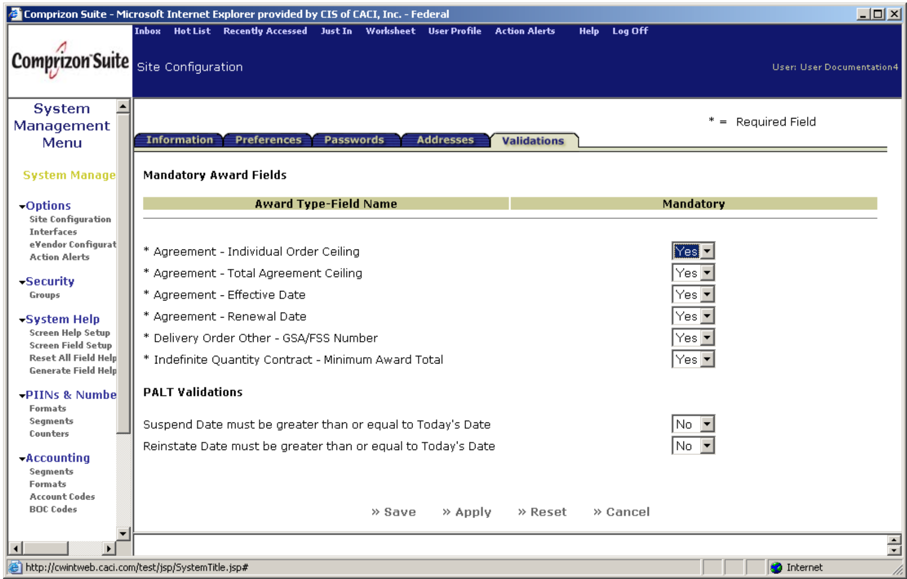

Figure 22. Site Configuration Screen - Validations Tab

Table 9. Site Configuration Screen Field Descriptions

Field	Description
Information Tab	
Comprizon.Suite Version	This field displays the version of Comprizon.Suite currently installed on the system, as well as the official release date for the version currently installed.
Contracting System	Select the correct contracting system (Comprizon.Suite or Comprizon.Buy) from the drop-down list provided.
Contracting Office Code	Enter the appropriate code for the site's contracting office.
Contracting Office Name	Enter the name for the site's contracting office.
FIPS 95 ID Number	Enter the FIPS 95 ID Number for the site.
Value Added Tax Rate	Enter the Value Added Tax Rate.
Micro-Purchase Limit	Enter the maximum dollar amount for a micro-purchase.
Preferences Tab	
OCONUS Designation	Select either "OCONUS" or "CONUS" from the drop-down list. Selecting OCONUS indicates that foreign currency is used.
Enable Warrant Tracking	Select either "Yes" or "No" from the drop-down list.
Enable Account Document Number Tracking	Select either "Yes" or "No" to indicate if the system should allow the use of Account Document Numbers (ADN).
Number of Lines to display per Page	Enter the appropriate value for the number of lines that displays for all users on lists and worksheets.

Recently Accessed Work	Enter the number of days that will display on the Recently Accessed Work screen.
Awards must have an approved obligation for reconciliation	Select either “Yes” or “No” to indicate if awards must have an approved obligation before they can be reconciled.
Allow identical numbers for new line items to be added to multiple draft modifications	Select either “Yes” or “No” to indicate if new line items to be added to multiple draft modifications will be permitted to have identical numbers.
Enable COR/COTR certification tracking	Select either “Yes” or “No” to indicate if the system should track COR/COTR certification.
Display COR/COTR active/inactive notices	Select either “Yes” or “No” to indicate if the system should display COR/COTR active/inactive notices.
Solicitation Issued	Select “Yes” or “No” to indicate if the system should send an automatic action alert for the contract specialist and, if applicable, the PR Buyer when a solicitation is issued.
Award Issued	Select “Yes” or “No” to indicate if the system should send an automatic action alert for the contract specialist, COTR, and, if applicable, the PR buyer when an award is issued.
Contract Deliverables	Select “Yes” or “No” to indicate if the system should send an automatic action alert to the COTR, contract specialist, and, if applicable, the PR buyer to notify them of contract deliverables that are overdue. Note that if the deliverable is associated with a requisition, the alert will be sent to the requisition’s buyer. The alert will be sent on the day the deliverable is due.
COTR Recertification	Select either “Yes” or “No” to indicate if the system should send an automatic action alert for COTR recertification. If you select Yes, then you will need to enter a number in the adjacent text box that appears for the number of days prior to the Certification Period End Date that the alert should be sent.
Solicitation Closed	Select “Yes” or “No” to indicate if the system should sent an automatic action alert to notify the contract specialist associated with the solicitation and, if applicable, the PR buyer that a solicitation is nearing it’s end date. For this alert type, you must enter a number for the number of days prior to the close of the solicitation that the alert will be sent.
Award Expiration	Select “Yes” or “No” to indicate if the system should sent an automatic action alert to notify the contract specialist, CO, COTR, the owner of the award, and, if applicable, the PR buyer that an contract is approaching the expiration date. For this alert type, you must enter a number for the number of days prior to the contract expiration that the alert will be sent. Note that the system allows users to update and delete Contract Expiration action alerts that are created automatically by the system. For example, a user who is associated with a base contract may not want to receive action alerts for delivery orders, BPA calls, etc.
Period of Performance	This alert indicates that a period of performance is nearing its end date. You may elect to not send an alert, to send one alert, or to send two alerts. If you elect to sent alerts, you must enter the number of days prior to the end of the period of performance that the alert should be sent and, if applicable, resent.
Support Documents	This field displays the directory where support documents are stored.
Passwords Tab	

Login Password Section	
Minimum Length	Enter the minimum number of characters for a login password.
Numeric Required in Password	Select "Yes" or "No" to indicate if login passwords must include numeric characters.
Expiration	Enter the number of days that a login password will be valid. Enter zero to indicate that passwords will not expire.
Days Prior to Expiration	Enter the number of days prior to the expiration of a login password that a notice will be sent informing the user that the password is about to expire.
Repeat Maximum	Enter the number of new passwords that must be used before a password can be reused. For example, if a user's password is "xxx123" and the Repeat Maximum is 5, then the user must use five other passwords before they are allowed to use "xxx123" again.
Invalid Characters	Enter characters that are not allowed in a login password.
Login Attempts	Enter the number of times that a user may attempt to login before the system either locks out the user who is using a valid user ID or displays the User Profile Administration screen for unrecognized user IDs. If on the last allowed login attempt, the user enters an incorrect password for a valid user ID, then the user is notified that the user ID has been deactivated, and they must contact the system administrator. If on the last attempt the user enters an invalid user ID, then the user is presented with the User Profile Administration screen.
Signature Password Section	
Minimum Length	Enter the minimum number of characters for a login password.
Numeric Required in Password	Select "Yes" or "No" to indicate if login passwords must include numeric characters.
Expiration	Enter the number of days that a login password will be valid. Enter zero to indicate that passwords will not expire.
Days Prior to Expiration	Enter the number of days prior to the expiration of a login password that a notice will be sent informing the user that the password is about to expire.
Repeat Maximum	Enter the number of new passwords that must be used before a password can be reused. For example, if a user's password is "xxx123" and the Repeat Maximum is 5, then the user must use five other passwords before they are allowed to use "xxx123" again.
Invalid Characters	Enter characters that are not allowed in a login password.
Addresses Tab **NOTE**: These addresses are the site default addresses that will be used when a user creates a procurement document.	
Purchase For	Enter the address code manually, or use the Lookup (Magnifying Glass) to search for and select an address.
Offer To	Enter the address code manually, or use the Lookup (Magnifying Glass) to search for and select an address.
Deliver To	Enter the address code manually, or use the Lookup (Magnifying Glass) to search for and select an address.
Ultimate Destination	Enter the address code manually, or use the Lookup (Magnifying Glass) to search for and select an address.
Contracting Office	Enter the address code manually, or use the Lookup (Magnifying Glass) to search for and select an address.
Issued By	Enter the address code manually, or use the Lookup (Magnifying Glass) to search for and select an address.
Admin By	Enter the address code manually, or use the Lookup (Magnifying Glass) to search for and select an address.

Invoice To	Enter the address code manually, or use the Lookup (Magnifying Glass) to search for and select an address.
Payment Office	Enter the address code manually, or use the Lookup (Magnifying Glass) to search for and select an address.
Validations Tab	
Award Type-Field Name column	This column displays various fields for which information is entered when creating an award.
Mandatory Column	Select "Yes" or "No" to indicate if the corresponding award type-field name is mandatory. Mandatory fields must be filled in before an award can be issued.

Interfaces

The Interfaces option within the Options menu allows you to manage the information necessary for interfacing with FPDS-NG, BPN, Fed Biz Opps, Financial Systems, BizDoc, and P-Card Reconciliation.

- Federal Procurement Data System – Next Generation (FPDS-NG) replaces FPDS as the Government's new consolidated procurement reporting system for collecting, editing, and validating contract reporting data across the entire Federal Government. The purpose of the FPDS-NG is to enhance the FPDS to lower the government-wide cost of operations, enhance responsiveness to customer needs, enable data collection and data sharing directly from agency electronic commerce systems, and improve the quality of and time required for collecting information.

  The new FPDS-NG System is a web-based system which will allow all Government procurement officials to report their award data on-line directly to a consolidated entry point. ComprizonSuite's System Administration module allows you to manage the login information for FPDS-NG.

- Business Partner Network (BPN) is the Federal Government's single source for gathering vendor data for grantees, Federal entities, and companies seeking to do business with the Federal government. The BPN is a search mechanism that provides of information for buyers and sellers including Equal Employment Opportunity compliance checks, size status, the Excluded Parties Listing System, past performance evaluations, etc.

  Using the System Administration module, you may specify if users must locate new vendors via BPN, if awards may only be given to BPN vendors, or if lookups will display only BPN vendors.

- Federal Business Opportunities (Fed Biz Opps, or FBO) is a single point of entry for Federal buyers to publish Federal business opportunities. Vendors can find the posted items for a spectrum of Federal departments and agencies.

  ComprizonSuite allows procurement officials to publish electronic procurement business opportunities information entered into Comprizon from the purchase request, solicitation, and award. The system creates a text file that can be submitted by the System Administrator directly to the FedBizOpps interface. Comprizon exports and appends each user's electronic submission in the data exchange formats established by the FedBizOpps system, using the current FedBizOpps interface templates.

- Financial interfaces allow financial data to be passed from ComprizonSuite to a financial system. ComprizonSuite allows you to manage the configuration, validations, and interface status information for the existing financial interfaces.
- BizDoc serves as a central repository for documents shared between ComprizonSuite and eVendor using the optional Web Solicitations module. The System Administration module allows you to manage the System ID and URL for BizDoc.
- The P-Card Reconciliation interface allows you to indicate if information for the entire agency or for an individual office will be exported.
- Vendor Past Performance (VPP) allows the user to complete vendor past performance evaluation for all contracts (both ComprizonSuite and non-ComprizonSuite contracts). These evaluations can be completed within ComprizonSuite or on a website external from ComprizonSuite. In addition, ComprizonSuite users can have alerts generated automatically each time an evaluation must be completed. To comply with Federal Regulations to complete annual report cards for vendors, VPP data from ComprizonSuite can be sent to the Government's Past Performance Information Retrieval System (PPIRS).

The following steps describe how to manage interfaces:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Interfaces** from the Options menu. This will open the Interface Configuration screen, which consists of the following seven tabs: FPDS-NG (Figure 23), BPN (Figure 24), Financial System (Figure 26), BizDoc (Figure 27), P-Card Reconciliation (Figure 28), and VPP & PPIRS (Figure 29).
3. Enter or edit the information as described in Table 10 and then select **Save**.

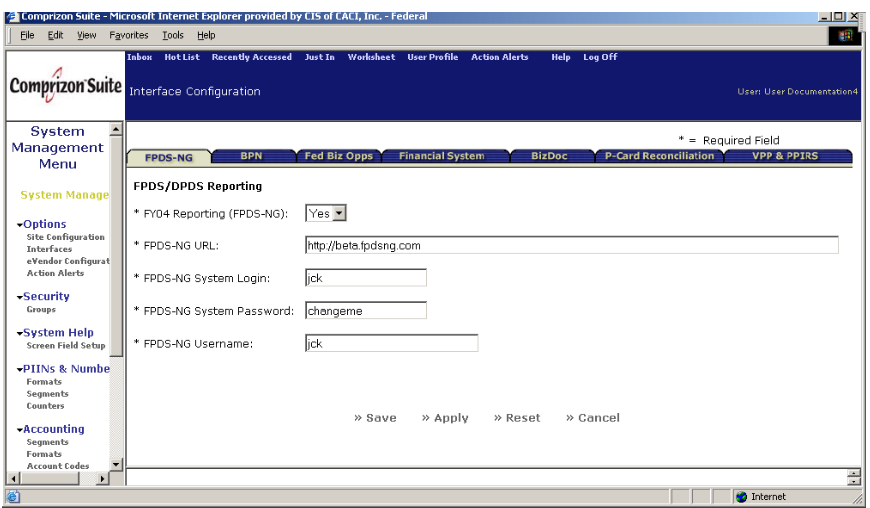

Figure 23. Interface Configuration Screen – FPDS-NG Tab

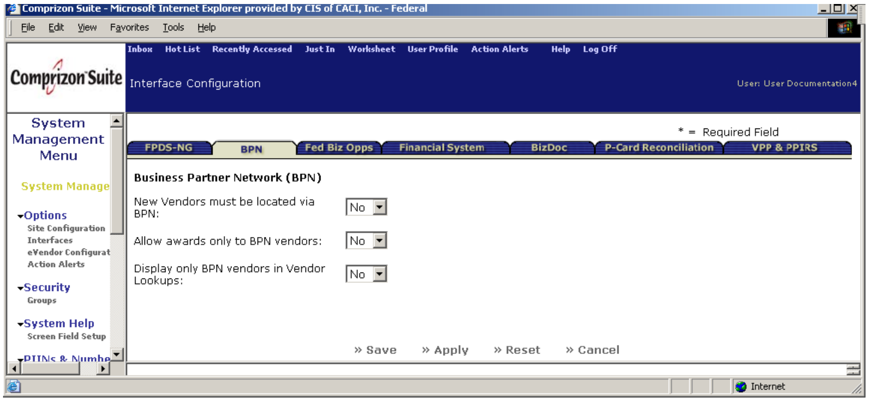

Figure 24. Interface Configuration Screen – BPN Tab

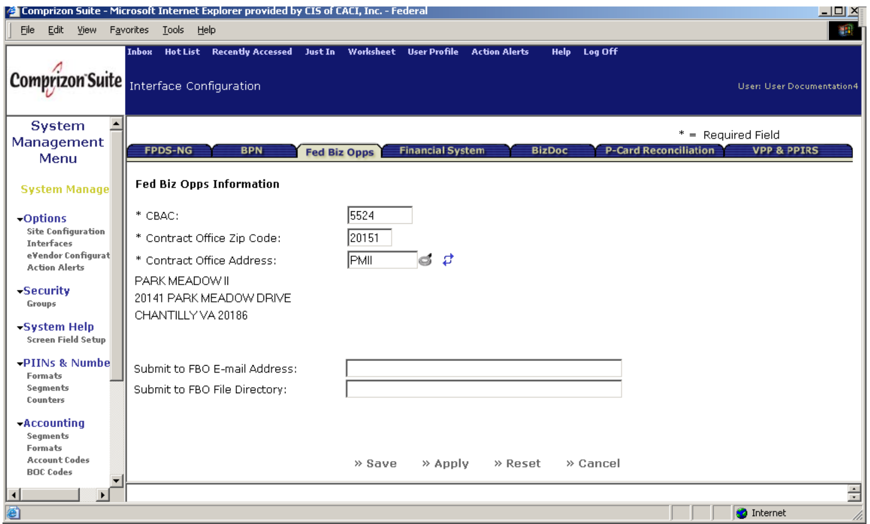

Figure 25. Interface Configuration Screen – Fed Biz Opps Tab

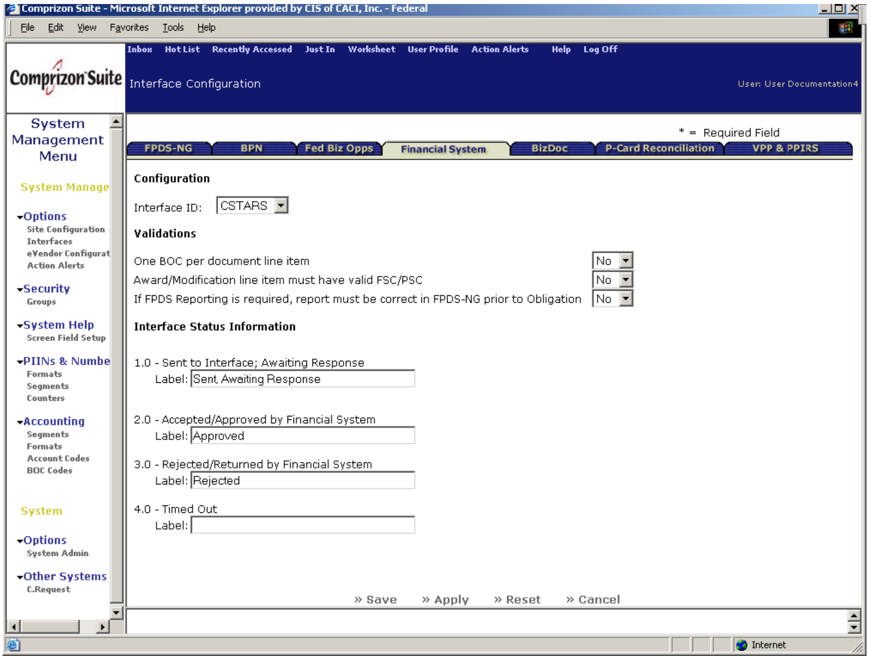

Figure 26. Interface Configuration Screen – Financial Systems Tab

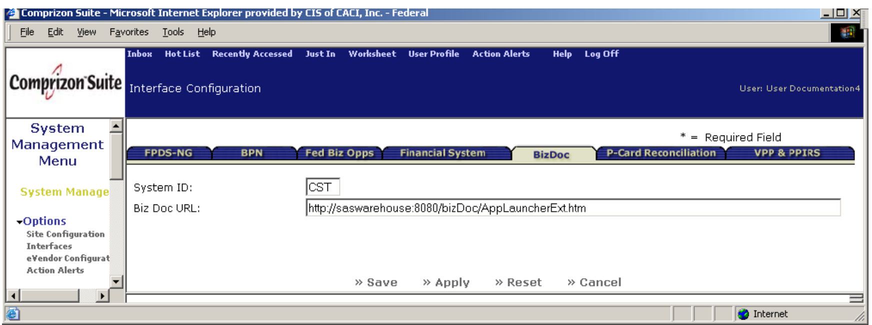

Figure 27. Interface Configuration Screen – BizDoc Tab

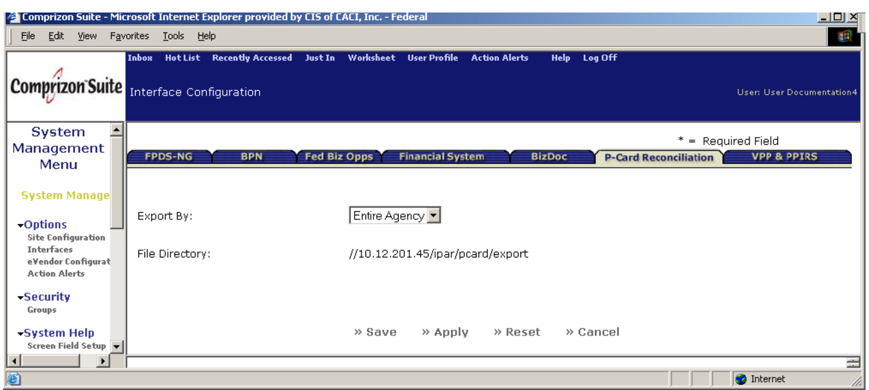

Figure 28. Interface Configuration Screen – P-Card Reconciliation Tab

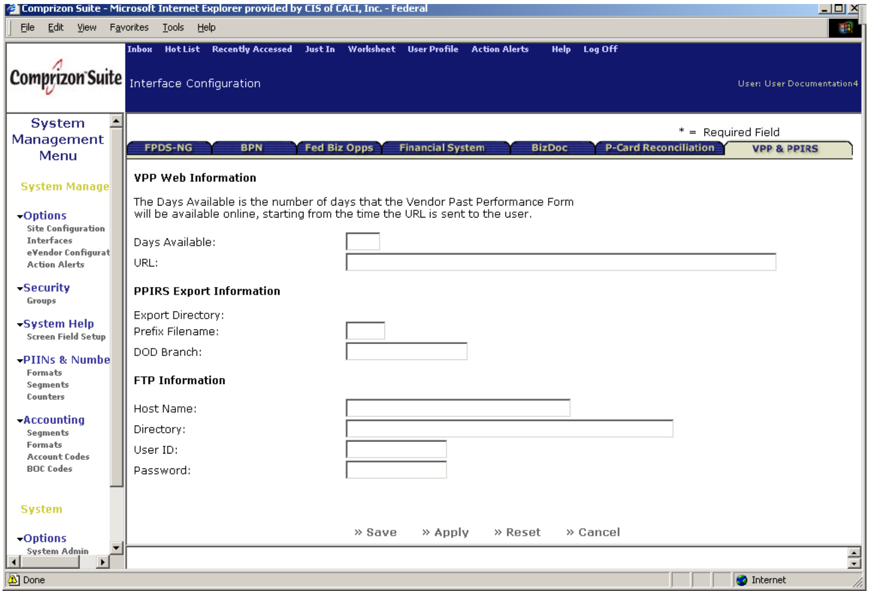

Figure 29. Interface Configuration Screen – VPP and PPIRS Tab

Table 10. Interface Configuration Screen Field Descriptions

Field	Description
FPDS-NG Tab	
FY04 Reporting (FPDS-NG)	Select either "Yes" or "No" from the drop-down list.
FPDS-NG URL	Enter the FPDS-NG URL, being sure to include the "http://".
FPDS-NG System Login	Enter the FPDS-NG login ID for the system.
FPDS-NG System Password	Enter the FPDS-NG system login password.
FPDS-NG Username	Enter your FPDS-NG username. This username will be used when users do not have individual usernames.
BPN Tab	
New Vendors must be located via BPN	Select either "Yes" or "No" from the drop-down list to indicate if any new vendors must be located using BPN.
Allow awards only to BPN vendors	Select either "Yes" or "No" from the drop-down list if awards may only be made to vendors in the BPN.
Display only BPN vendors in Vendor Lookups	Select either "Yes" or "No" from the drop-down list to indicate if only BPN vendors should be displayed when users search for vendors.
Fed Biz Opps Tab	
CBAC	Enter the contracting office's Billing Account Code. The CBAC consists of nine alphanumeric characters. The first three characters are GPO; the following 6 characters are the site's numeric account number. The value entered in this fill-in field will default into Item 4 in all Fed Biz Opps synopses.

	This field may not be blank. If a site uses more than one CBAC, the user may manually update the code after it has defaulted into a synopsis record.
Contract Office Zip Code	Enter the zip code for the contracting office. This value will be the default; the user may update this field as necessary.
Contract Office Address	Enter the default address for the contracting either by manually entering the address code or by using the Lookup (Magnifying Glass) to search for and select the proper address. The user may update this information as necessary.
Submit to FBO E-mail Address	If desired, enter the default e-mail address for submitting the synopsis. The user may update this information as necessary.
Submit to FBO File Directory	If desired, enter a default directory. If a directory is entered, all synopses submitted from the will be written to a specific file (this file is automatically created each day) in this directory. If this field is left blank, users will be prompted when submitting each synopsis to specify the location and file.
Financial Systems Tab	
Interface ID	Select the correct interface from the drop-down list provided.
Validations section	For each of the validations listed below, select either "Yes" or "No" from the drop-down list provided. ▪ One BOC per document line item ▪ Award/Modification line item must have valid FSC/PSC code ▪ If FPDS Reporting is required, report must be correct in FPDS-NG prior to Obligation.
Interface Status Information	Interface status information indicates the status of financial transactions that have been sent from Comprizon Suite to the financial interface. For each status, use the Label tab to enter the message that will be displayed to users. The following statuses exist: ▪ *Sent to Interface; Awaiting Response*. This status indicates that the financial transaction has been sent from Comprizon Suite and is in route to the financial interface. ▪ *Accepted/Approved by Financial System*. This status indicates that the commitment/obligation process has been successfully completed in the financial system. ▪ *Rejected/Returned by Financial System*. This status indicates that the commitment/obligation process was not successfully completed in the financial system. The user will have the ability to modify information in Comprizon Suite and resend the transaction to the financial system. ▪ *Timed Out*. This status indicates that the financial transaction was not successfully sent to the financial system. The user will have the ability to resend a transaction that has been timed out.
BizDoc Tab	
System ID	Enter the system ID.
Biz Doc URL	Enter the URL for Biz Doc.
P-Card Reconciliation Tab	
Export By	Select one of the options from this drop-down list to indicate the data that will be exported for P-Card reconciliation. If the site will not use a financial interface, then leave this field blank.
File Directory	Displays the path to the location where the exported file will be saved.
VPP & PPIRS Tab	

Days Available	Enter the number of days that the Vendor Past Performance form will be available online, starting from the time the URL is sent to the user. To keep the form available indefinitely, leave this field blank.
URL	Enter the URL where the online Vendor Past Performance is located
Export Directory	Displays the directory to which the PPIRS Export data will be written.
Prefix Filename	Enter any characters that will prefix the filename. This will be used in the filename of the PPIRS Export and in the PPIRS Export file.
DOD Branch	Enter the name of the DOD branch. This will be used in the PPIRS Export file.
Host Name	Enter the host name for the FTP site.
Directory	Enter the directory for the FTP site.
User ID	Enter the user ID for accessing the FTP site.
Password	Enter the password for accessing the FTP site.

eVendor Configuration

The eVendor Configuration option allows you to control the text for the Vendor Agreement and Registration Messages that will be displayed to users registering in the optional eVendor module. It also allows you to enter rules for login and signature passwords.

The following steps describe how to maintain eVendor configuration:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **eVendor Configuration** from the Options menu. This will open the eVendor Configuration screen, which consists of the following two tabs: Information (Figure 30) and Passwords (Figure 31).
3. Enter the information as described in Table 11.
4. Select **Save** to save changes.

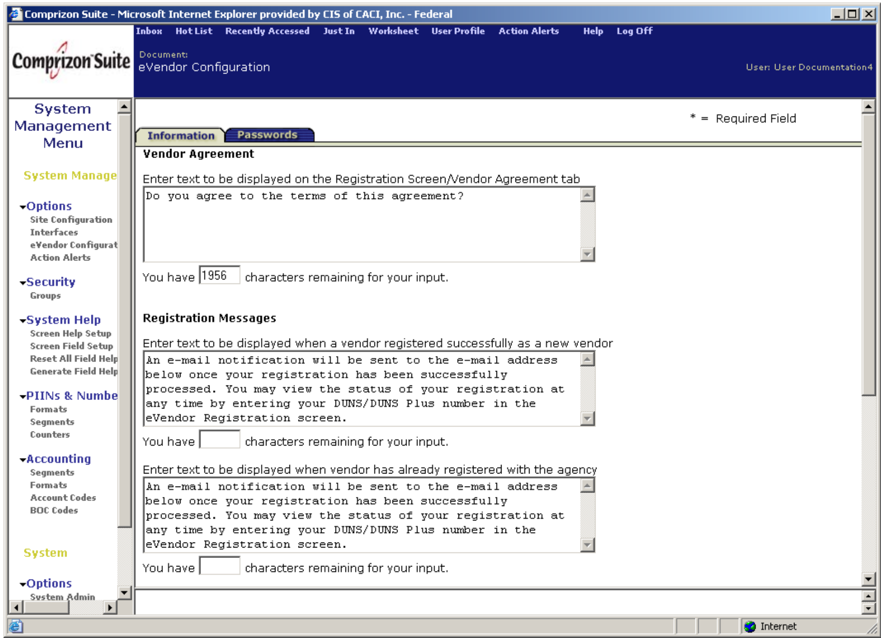

Figure 30. eVendor Configuration Screen – Information Tab

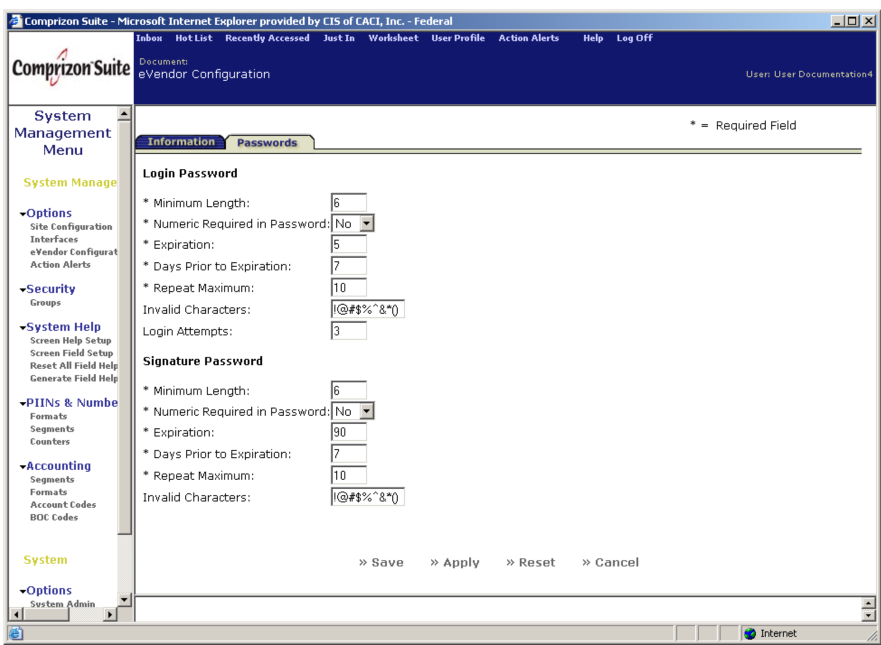

Figure 31. eVendor Configuration Screen – Passwords Tab

Table 11. eVendor Configuration Screen Field Descriptions

Field	Description
Information Tab	

For each message, enter the text that will be displayed to the vendor when registering. The counters below each message field indicate the maximum number of remaining characters for that message.	
Passwords Tab	
Login Password Section	
Minimum Length	Enter the minimum number of characters for a login password.
Numeric Required in Password	Select "Yes" or "No" to indicate if login passwords must include numeric characters.
Expiration	Enter the number of days that a login password will be valid. Enter zero to indicate that passwords will not expire.
Days Prior to Expiration	Enter the number of days prior to the expiration of a login password that a notice will be sent informing the user that the password is about to expire.
Repeat Maximum	Enter the number of new passwords that must be used before a password can be reused. For example, if a user's password is "xxx123" and the Repeat Maximum is 5, then the user must use five other passwords before they are allowed to use "xxx123" again.
Invalid Characters	Enter characters that are not allowed in a login password.
Login Attempts	Enter the number of times that a user may attempt to login before the system either locks out the user who is using a valid user ID or displays the User Profile Administration screen for unrecognized user IDs. If on the last allowed login attempt, the user enters an incorrect password for a valid user ID, then the user is notified that the user ID has been deactivated, and they must contact the system administrator. If on the last attempt the user enters an invalid user ID, then the user is presented with the User Profile Administration screen.
Signature Password Section	
Minimum Length	Enter the minimum number of characters for a login password.
Numeric Required in Password	Select "Yes" or "No" to indicate if login passwords must include numeric characters.
Expiration	Enter the number of days that a login password will be valid. Enter zero to indicate that passwords will not expire.
Days Prior to Expiration	Enter the number of days prior to the expiration of a login password that a notice will be sent informing the user that the password is about to expire.
Repeat Maximum	Enter the number of new passwords that must be used before a password can be reused. For example, if a user's password is "xxx123" and the Repeat Maximum is 5, then the user must use five other passwords before they are allowed to use "xxx123" again.
Invalid Characters	Enter characters that are not allowed in a login password.

ACTION ALERTS

Follow these steps to view action alerts that have been generated for the system. The system will display action alerts that have been sent but have not yet been deleted by the user.

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select the **Action Alerts** option from the Options menu. This will open the Current System Action Alerts screen.
3. If desired, you may use search criteria to narrow the list of action alerts displayed on this screen.

SECURITY GROUPS

Comprizon Suite allows you to create user groups and then assign permissions to that group. This feature allows you to control access to certain functions.

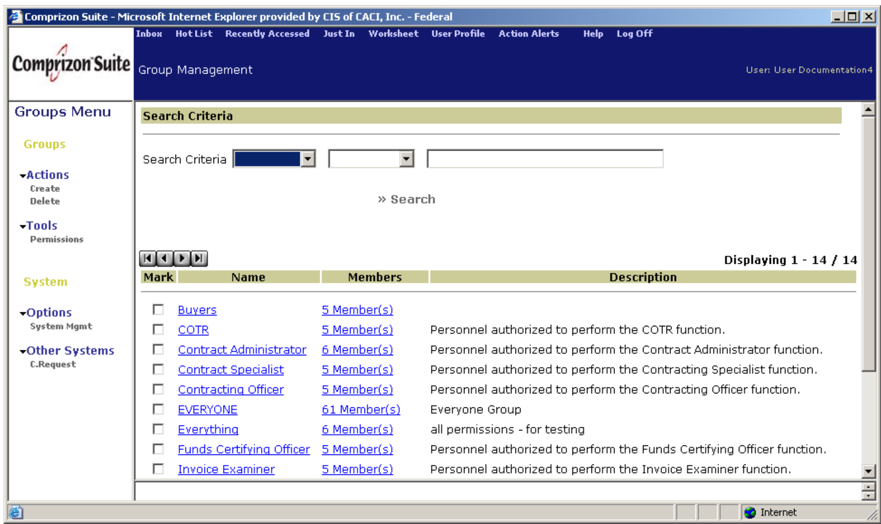

Figure 32. Group Management Screen

Create a Group

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Groups** from the Security menu. This will open the Group Management screen shown in Figure 32.
3. Select **Create** from the Actions menu on the Group Management screen. This will open the Group Detail screen shown in Figure 33.
4. Enter a name for the group in the **Name** field and, if desired, enter a brief description in the **Description/Comments** field.
5. Select **Save** to save the information.

NOTE: The newly created group will not have any members. Refer to the following section for additional information for adding members to and removing members from a group.

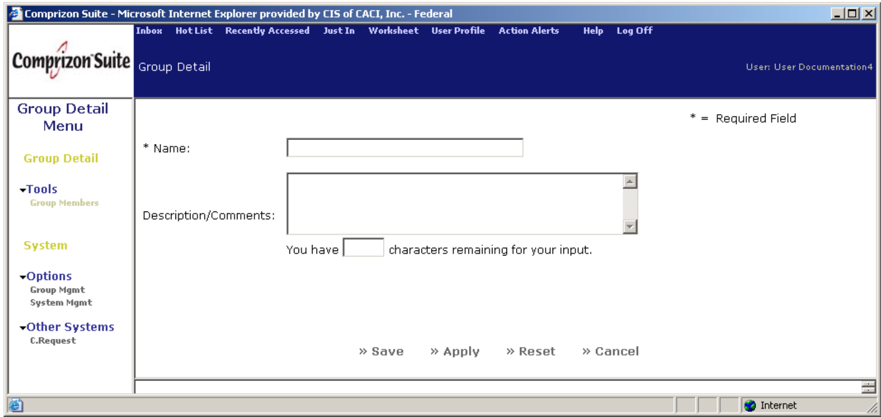

Figure 33. Group Detail Screen

Manage Group Members

The number of members in a group will be displayed as a link in the Members column on the Group Management screen. Selecting this link will open the Group Members Management screen shown in Figure 34. This screen lists users who are already members of the group.

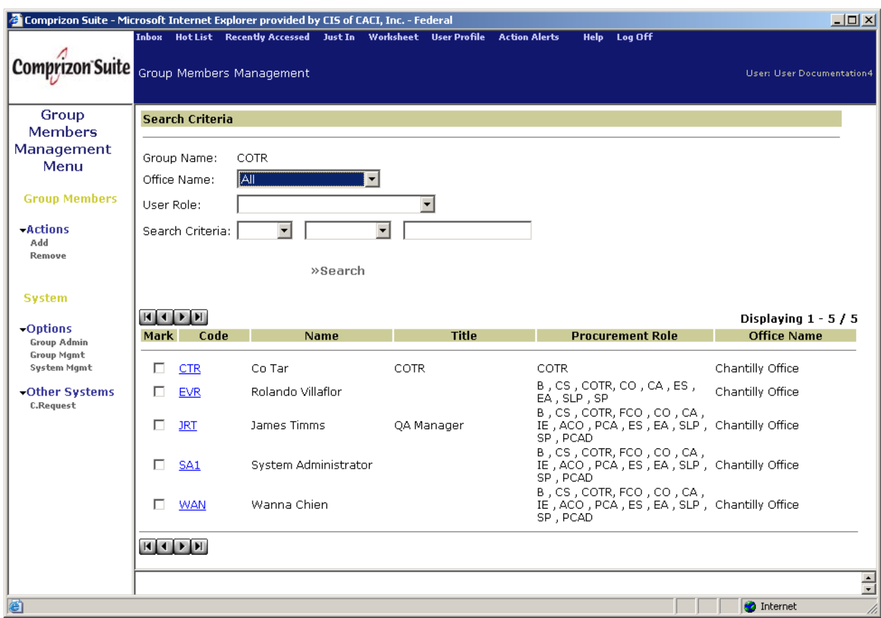

Figure 34. Group Members Management Screen

Add Group Members

The following steps describe how to add members to a group:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.

2. Select **Groups** from the Security menu. This will open the Group Management screen shown in Figure 32.
3. Select **Add** from the Actions menu. This will open the Create Group Members screen shown in Figure 35.

NOTE: Users who are already members of the group will be marked with an asterisk.

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4. Mark the user's checkbox in the Mark column.
5. Select **Add/Select** from the Actions menu.

TIP: Multiple users can be added to a group simultaneously by marking the checkboxes for all of the users you wish to add before selecting Add/Select.

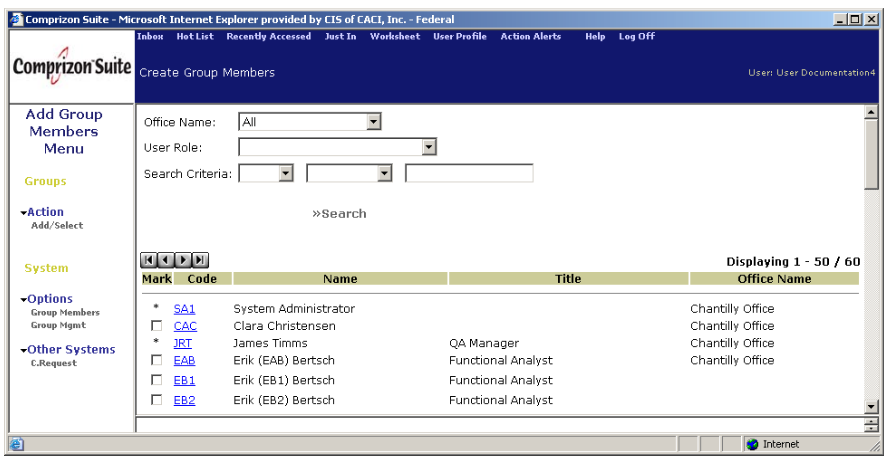

Figure 35. Create Group Members Screen

Remove Users from a Group

The following steps describe how to remove members from a group:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Groups** from the Security menu. This will open the Group Management screen shown in Figure 32.
3. Mark the user's checkbox in the Mark column.
4. Select **Remove** from the Actions menu.

TIP: Multiple entries can be removed simultaneously by marking the checkboxes for all of the entries you wish to remove before selecting Remove.

Edit an Existing Group

To following steps describe how to edit the details (not members) of an existing group:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Groups** from the Security menu. This will open the Group Management screen shown in Figure 32.
3. Select the group's name in the Name column. This will open the Group Detail screen.
4. Make any necessary changes to the **Name** and/or **Description/Comments** fields.
5. Select **Save** to save the changes.

Delete an Existing Group

To following steps describe how to delete an existing group:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Groups** from the Security menu. This will open the Group Management screen shown in Figure 32.
3. Mark the group's checkbox in the Mark column.
4. Select **Delete** from the Actions menu.

TIP: Multiple entries can be deleted simultaneously by marking the checkboxes for all of the entries you wish to delete before selecting Delete.

Manage Group Permissions

Group permissions are assigned to control the functions that a group is able to perform.

NOTE: If a user does not have permission to perform a function, then that function will not appear on the menus within the application.

NOTE: When a user is a member of multiple groups that each have different permissions, the system will allow the user access to a screen/function when at least one of the groups to which the user is a member allows access to that screen/function. Therefore, if a user should not have access to an area/function, then they should not be added to any groups that have access to that area/function.

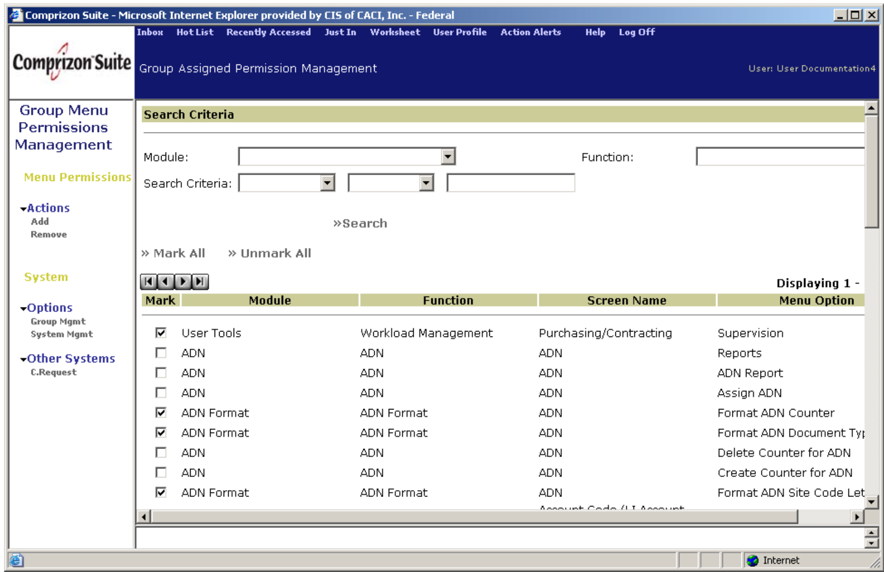

Figure 36. Group Assigned Permission Management Screen

Add Group Permissions

The following steps describe how to manage the add permissions to a group:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Groups** from the Security menu. This will open the Group Management screen shown in Figure 32.
3. Mark the group's checkbox in the Mark column.
4. Select **Permissions** from the Tools menu. This will open the Group Assigned Permission Management screen shown in Figure 36. This screen lists all of the permissions currently given to the group.
5. Select **Add** from the Actions menu. This will open the Add Group Permissions screen shown in Figure 37. On this screen, the permissions already given to a group will be marked with an asterisk.
6. Mark the checkbox for the permission you wish to add.

TIP: Multiple permissions can be added simultaneously by marking the checkboxes for all of the permissions you wish to add.

7. Select **Add/Select** from the Actions menu.

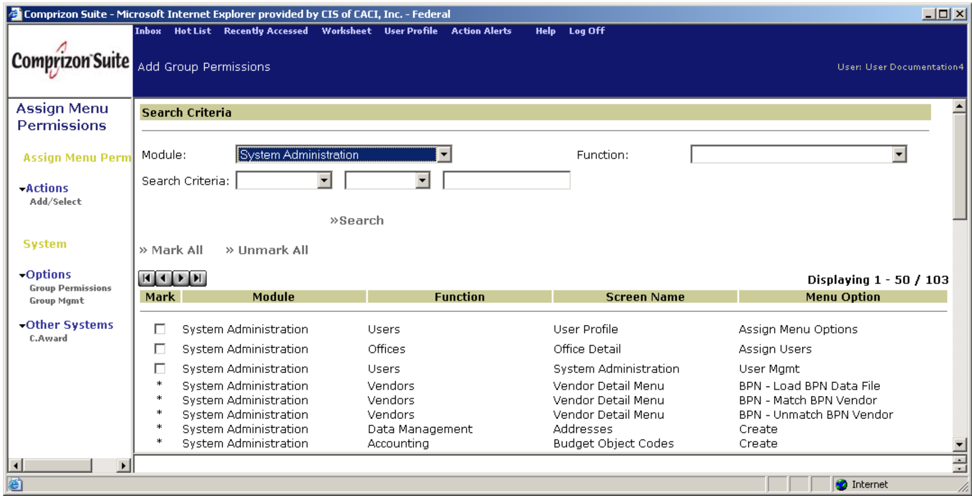

Figure 37. Add Group Permissions Screen

Remove Permissions

The following steps describe how to remove permissions that have previously been assigned to a group:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Groups** from the Security menu. This will open the Group Management screen shown in Figure 32.
3. Mark the group's checkbox in the Mark column.
4. Select **Permissions** from the Tools menu. This will open the Group Assigned Permission Management screen shown in Figure 36. This screen lists all of the permissions currently given to the group.
5. Mark the checkbox for that permission in the Mark column.

TIP: Multiple permissions can be removed simultaneously by marking the checkboxes for all of the permissions you wish to remove.

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6. Select **Remove** from the Actions menu.

SCREEN FIELD HELP SETUP

The Screen Field Setup screen shown in Figure 38 allows you to manage the screen field help.

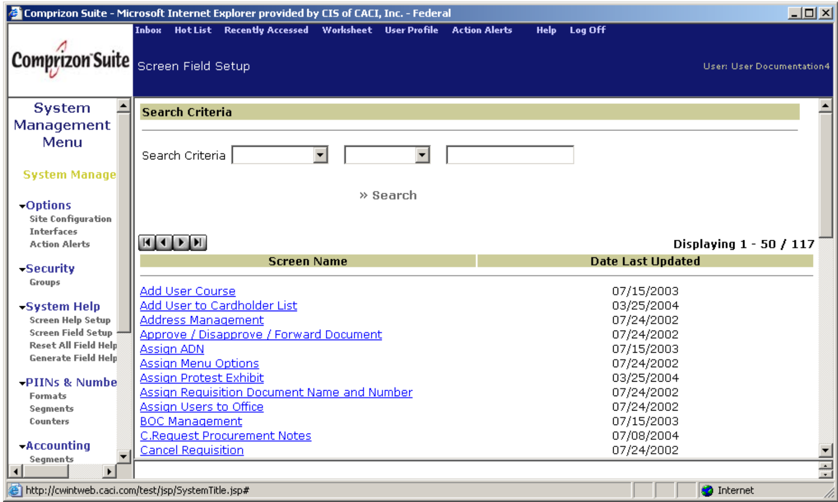


Figure 38. Screen Field Setup Screen

The following steps describe how to maintain field-level help:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Screen Field Setup** from the System Help Menu.
3. Select the link in the Screen Name column for the screen that contains the field. This will open the Screen Field List shown in Figure 39, which lists all of the fields on the screen you selected.

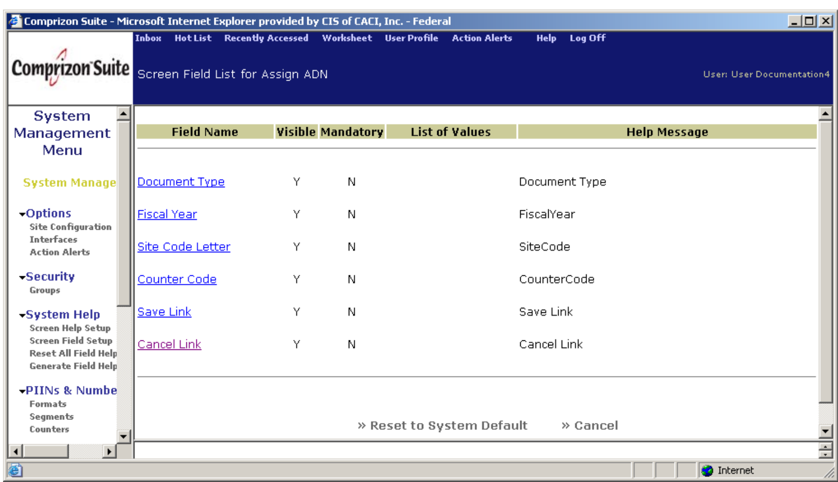


Figure 39. Screen Field List Screen

4. Select the link in the Field Name column for the field with the help you wish to edit. The Screen Field Detail screen for the field you selected will open.

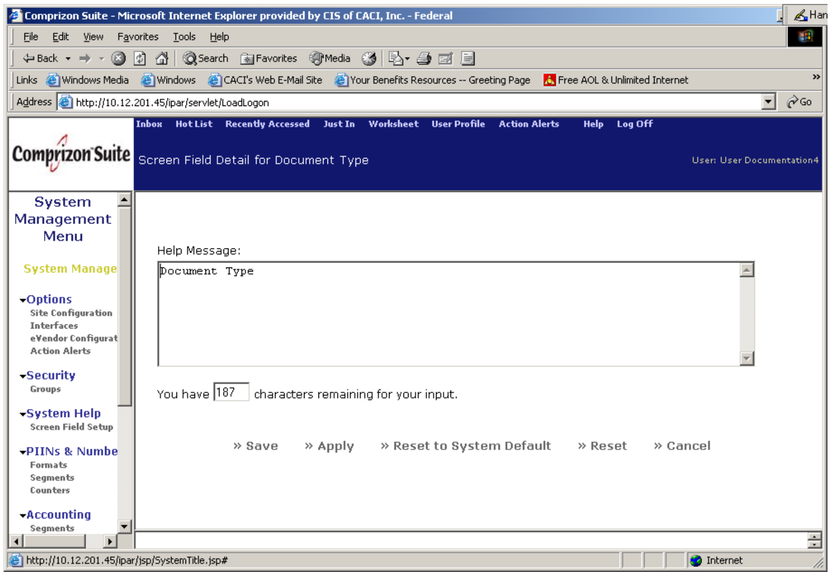


Figure 40. Sample Screen Field Detail Screen

5. You may now either edit the current help message, or reset the message to the system default value by selecting one of the reset options at the bottom of the screen.
   - **Reset to System Default** – resets the help message to the system default message.
   - **Reset** – resets the help message to the most recently saved message.

PIINs

PIINs (Procurement Instrument Identification Numbers) are unique numbers that are used to identify requisitions, purchase requests, solicitations, amendments, awards, and modifications. These PIINs may be auto-generated by the system or assigned manually by the user (if allowed in the System Administration settings). The options in the PIINs & Numbers menu within the System Management Menu allow you to configure the format of auto-generated PIINs, including the segment values and counter codes.

Setting up an auto-generated PIIN format consists of the following steps. Each step is described in greater detail in the following sections.

1. First set up the segments values. This consists of giving a segment a name and a length, and then entering the possible values for the segment, which will appear in the drop-down list for the segment when the user is creating the PIIN.
2. Next create the format for a particular document type by selecting the number of segments that will be contained in the PIIN and then selecting the contents of each segment.
3. The third step is to define the counters for the counter codes.

PIIN Segments Configuration

Configuring PIIN Segments allows you to create and edit the label name, length, and values for PIIN segments.

Create a New PIIN Segment

The following steps describe how to create a new PIIN segment:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Segments** from the PIINs & Numbers menu. The PIIN Segment Value Management screen shown in Figure 41 displays.

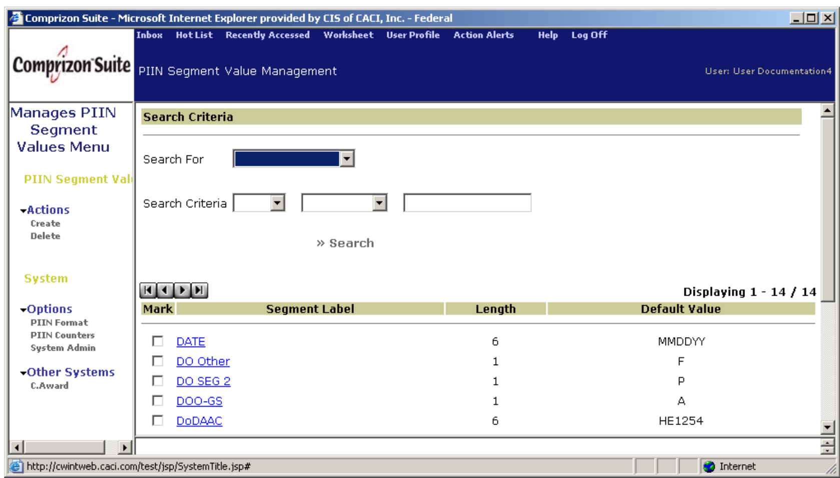


Figure 41. PIIN Segment Value Management Screen

3. Select **Create** from the Actions menu. The PIIN Segment Values screen displays. This screen consists of the following two tabs: Label Name (Figure 42) and Value List (Figure 43).

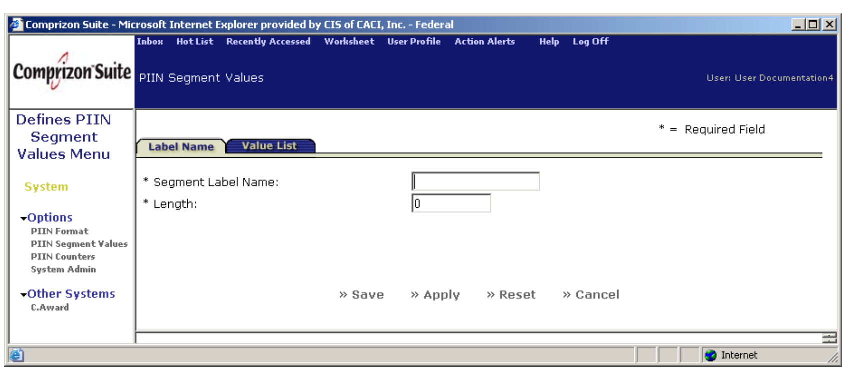


Figure 42. PIIN Segment Values Screen - Label Name Tab

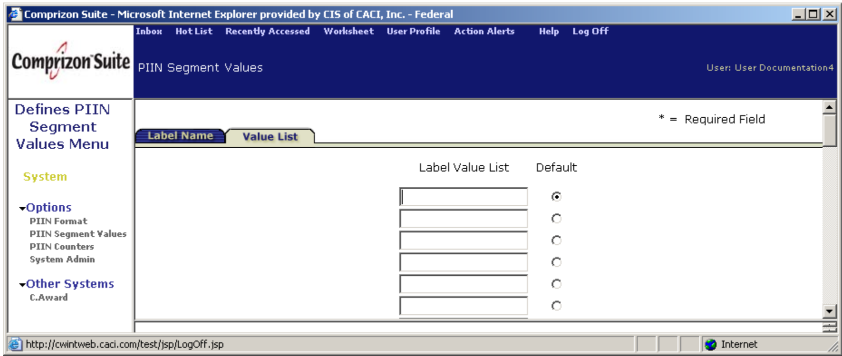


Figure 43. PIIN Segment Values Screen – Value List Tab

4. Enter the **Segment Label Name** and the **Length** (i.e., number of characters) on the Label Name tab.
5. Next open the Value List tab to define the values that will be available to the user in the segment's drop-down list when assigning the PIIN. Enter each available value in a separate box, and then mark the radio button for the default value for that segment.
6. Select **Save** to save the new PIIN segment.

NOTE: You will need to create segments for every part of your PIINS that will be setup in the database except for Fiscal Year. Examples of segments could include activity code, micropurchase office, purchasing office, requesting office, codes for award types, etc.

Edit an Existing PIIN Segment

The following steps describe how to edit an existing PIIN segment:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Segments** from the PIINs & Numbers menu. The PIIN Segment Value Management screen shown in Figure 41 displays.
3. Select the link for the segment in the Segment Label column. The PIIN Segment Value Screen displays.
4. Use the Label Name tab to make changes to the **Segment Label Name** and the **Length** (i.e., number of characters).
5. Next open the Value List tab to edit the values that will be available to the user in the segment's drop-down list when assigning the PIIN. Each value should be entered in a separate box. Mark the radio button adjacent to a value to make that value the default.
6. Select **Save** to save the changes.

Delete an Existing PIIN Segment

The following steps describe how to delete an existing PIIN segment.

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Segments** from the PIINs & Numbers menu. The PIIN Segment Value Management screen shown in Figure 41 displays.
3. Select the checkbox in the Mark column for the segment you wish to delete.

TIP: Multiple entries can be deleted simultaneously by marking the checkboxes for all of the entries you wish to delete.

---

4. Select **Delete** from the Actions menu.

PIIN Formats

A PIIN format is a collection of PIIN segments that is assigned to particular document type. The PIIN Format Management screen shown in Figure 44 diplays all of the different document types, along with the current PIIN format assigned for that document type.

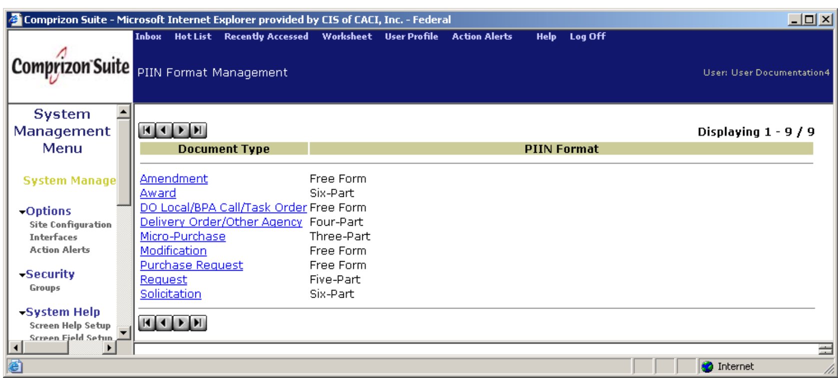


Figure 44. PIIN Format Management Screen

The following steps describe how to configure PIIN formats:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Formats** from the PIINs & Numbers menu. The PIIN Format Management screen displays. This screen lists all of the different document types, along with the current PIIN format assigned for that document type.
3. Select the document type in this list. This will open the PIIN Format Detail screen. This screen consists of the following three tabs: Set PIIN (Figure 45), Segments (Figure 46), and Counter Segment Labels (Figure 47). Table 12 provides descriptions of and instructions for the fields on this screen.
4. First, use the SET PIIN tab to set the length (number of segments) of the PIIN. PIINs may consist of a maximum of eight segments This screen also allows you to indicate which segments of the PIIN, if any, will contain the Fiscal Year, Counter Code, and Counter, as well as to define the Free Form Length and Counter Length.
5. After defining the number of segments in the PIIN, the next step is to use the Segments tab to define the contents of each segment. Each segment number will correspond to a drop-down list

that contains the possible values for that segment. Select the appropriate Segment Label from the list for each segment.

6. If one of the segments has been defined as a Counter Code, then use the Counter Segment Labels tab to select the label that displays in the system for the PIIN's counter code segment, by selecting a label from the drop-down list.
7. When you have finished, select **Save** to save changes to the PIIN format.

NOTE: If you select any format other than Free Form, you must include a counter code and counter in the format.

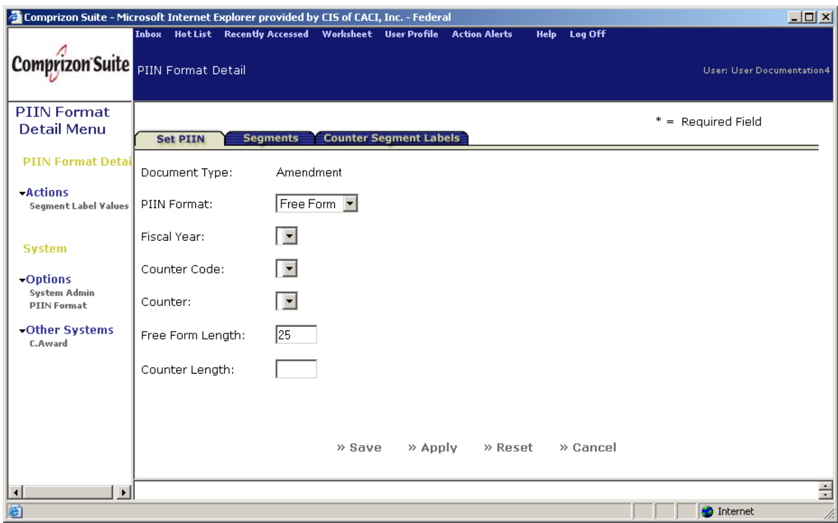


Figure 45. PIIN Format Detail Screen – Set PIIN Tab

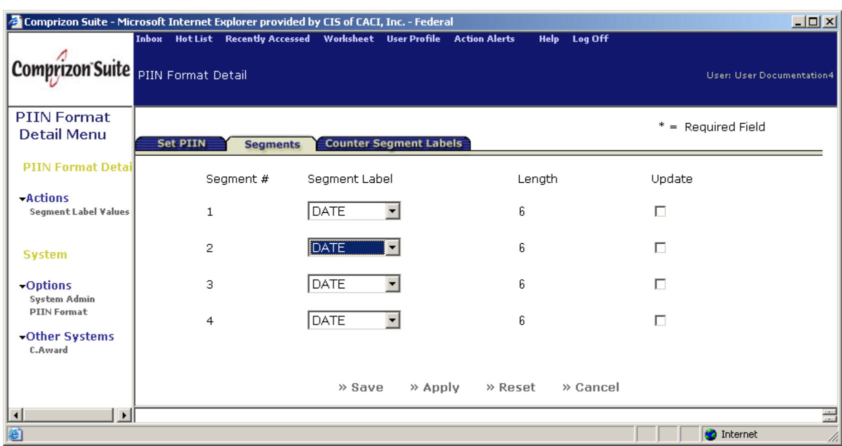


Figure 46. PIIN Format Detail Screen – Segments Tab

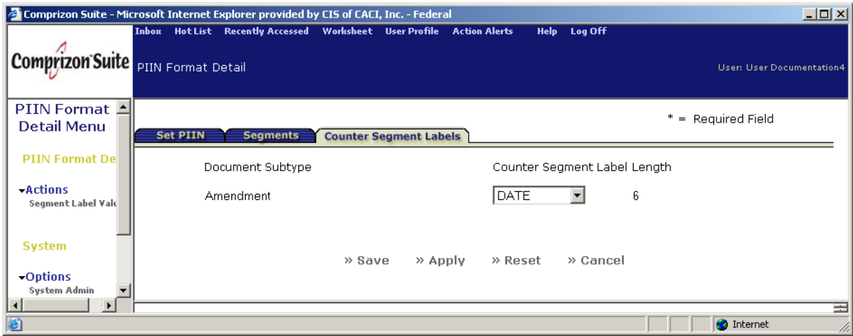


Figure 47. PIIN Format Detail Screen – Counter Segment Labels Tab

Table 12. PIIN Format Detail Screen Field Descriptions

Field	Description
Set PIIN Tab	
Document Type	Displays the Document Type to which this PIIN format applies. This is the document type you selected from the list on the PIIN Format Management screen.
PIIN Format	Select the number of segments that will be included in this PIIN.
Fiscal Year	Indicates the segment in which the fiscal year will appear. Select the segment number from the drop-down list; select zero to indicate that the fiscal year will not be included in the PIIN.
Counter Code	Indicates the segment number in which the counter code will appear. Select the segment number from the drop-down list provided; if it is a free-form format, you can select zero from the list to indicate that the counter code will not be included in the PIIN.
Counter	Indicates the segment number in which the counter will appear. Select the segment number from the drop-down list provided; if it is a free-form format, you can select zero from the list to indicate that the counter will not be included in the PIIN.
Free Form Length	When the document type is Free-Form, enter the maximum length (up to 25 characters) for the PIIN that users can enter. **NOTE**: Fiscal Year, Counter Code and Counter will be zero when the PIIN format is Free-Form.
Counter Length	Enter the number of digits in the counter. **NOTE**: The total length of the PIIN cannot exceed 25 characters.
Segment Tab	
Segment # column	Indicates the segment number defined by the corresponding drop-down list.
Segment Label column	Use this drop-down list to define the value for this segment.
Length column	Displays the number of characters in this segment.
Update column	Marking this checkbox means that when the user is assigning a PIIN, the user will be able to either select a value from the predefined list for a particular segment or manually enter another value for that segment. If the checkbox is not marked, then the user must pick the value for that segment from the predefined list.
Counter Segment Labels Tab	
Document Subtype column	Displays the Document Subtypes for the document type you selected. The adjacent Counter Segment Label and Length describe the counter for the corresponding Document Subtype
Counter Segment Label	Use this drop-down list to define the value for this segment.
Length	Displays the number of characters in this segment.

PIIN Counters

Create a New Counter

The following steps describe how to create new PIIN counters:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Counters** from the PIINs & Numbers menu. The PIIN Counter Code Management screen shown in Figure 48 displays.

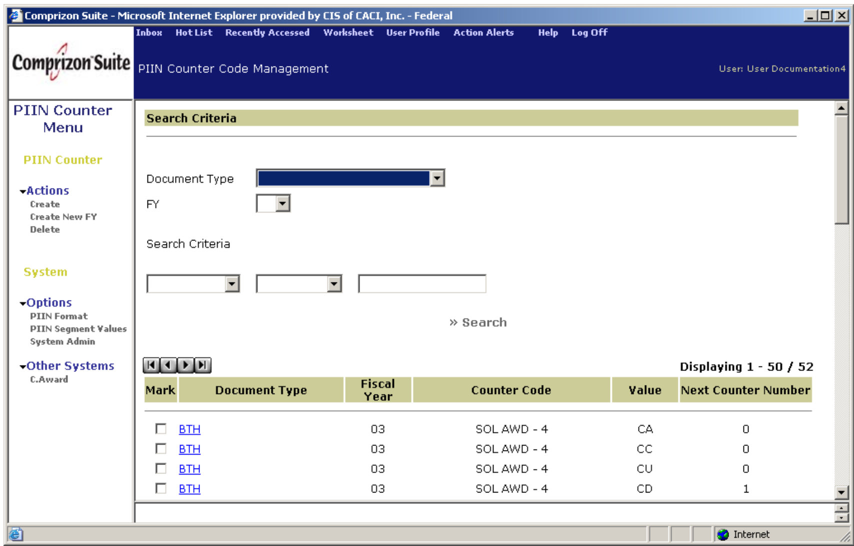


Figure 48. ***PIIN Counter Code Management Screen***

3. Select **Create** from the Actions menu. The PIIN Counter Detail screen displays. This screen consists of the following two tabs: Counter Type (Figure 49) and Counter Detail (Figure 50).

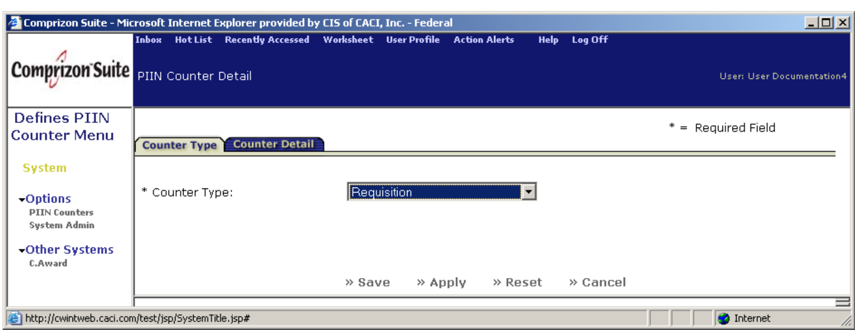


Figure 49. PIIN Counter Detail Screen - Counter Type Tab

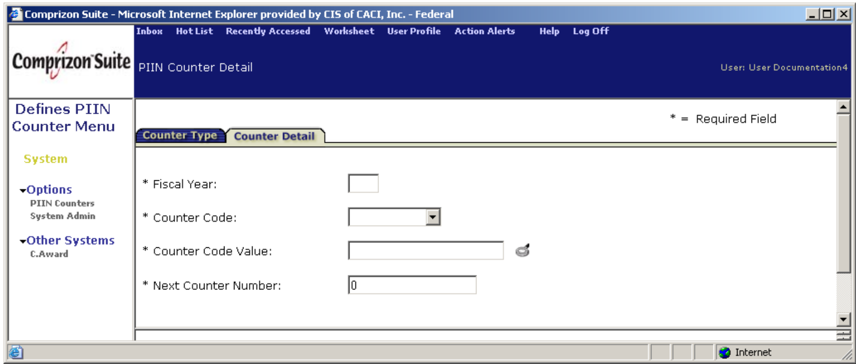


Figure 50. PIIN Counter Detail Screen - Counter Detail Tab

4. To create the counter, first select the **Counter Type** from the drop-down list on the Counter Types tab. Next open the Counter Detail tab and enter the information as described in Table 13.
5. Select **Save** to save changes.

Table 13. PIIN Counter Details Screen (Counter Detail Tab) Field Descriptions

Field	Description
Fiscal Year	Enter the last two digits of the fiscal year (e.g., “04”).
Counter Code	Select the appropriate Counter Code from the drop-down list provided.
Counter Code Value	Enter the Counter Code Value, or use the Lookup (Magnifying Glass) to search for and select the appropriate value for the Counter Code. The valid values will vary based on the Counter Code selected in the previous field.
Next Counter Number	The system displays the next PIIN Counter that will be used when the user assigns a PIIN to a document with this Fiscal Year and counter code. This allows the System Administrator to define where a particular counter should begin.

Edit an Existing Counter

The following steps describe how to edit the next counter number for an existing counter:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Counters** from the PIINs & Numbers menu. The PIIN Counter Code Management screen shown in Figure 48 displays.
3. Select the counter in the Document Type column.
4. Select the Counter Detail tab.
5. Make any necessary changes to the **Next Counter Number** field.
6. Select **Save** to save changes.

Create a New Fiscal Year Counter

The following steps describe how to create a new fiscal year calendar:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Counters** from the PIINs & Numbers menu. The PIIN Counter Code Management screen shown in Figure 48 displays.
3. Select **Create New FY** from the Actions menu. The Create New Fiscal Year Counter screen shown in Figure 51 displays.
4. Enter the information as described in Table 14.
5. Select **Save** to save changes.

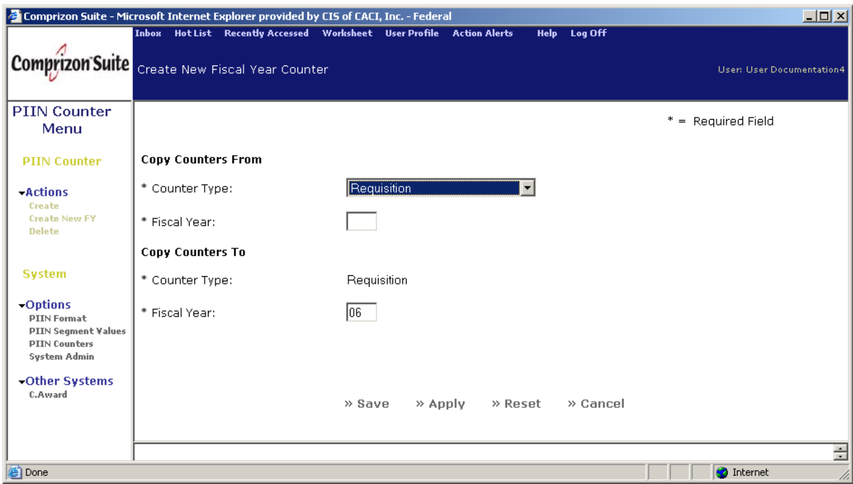


Figure 51. Create New Fiscal Year Counter Screen

Table 14. Create New Fiscal Year Counter Field Descriptions

Field	Description
Copy Counters From section	
Counter Type	Select the document type that has the counters you wish to copy.
Fiscal Year	Enter the last two digits of the fiscal year that has the counters you wish to copy.
Copy Counters To section	
Counter Type	Displays the document type for the new fiscal year counters.
Fiscal Year	Enter the last two digits of the fiscal year for the new fiscal year counters.

Delete an Existing Counter

The following steps describe how to delete an existing counter:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Counters** from the PIINs & Numbers menu. The PIIN Counter Code Management screen shown in Figure 48 displays.

3. Mark the checkbox for that counter in the Mark column.
4. Select **Delete**.

NOTE: Counters may only be deleted if they are not being used on any documents.

TIP: Multiple entries can be deleted simultaneously by marking the checkboxes for all of the entries you wish to delete before selecting Delete.

ADN Number (GSA Sites Only)

An Account Document Number (ADN) is a unique number that is used to identify a procurement action at the accounting level. ADNs may be generated on a Requisition, Purchase Request, or Award. Comprizon Suite lets you manage ADN Numbers by maintaining Document Types, Site Code Letters, and Counters.

NOTE: The functions described in this section will only be available if ADN tracking is enabled in the site configuration settings.

Document Types

The following steps describe how to manage ADN document types:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **ADN Numbers** from the PIINs & Numbers menu.
3. Next select **Document Types** from the Options menu. This will open the ADN Document Type Management screen shown in Figure 52.

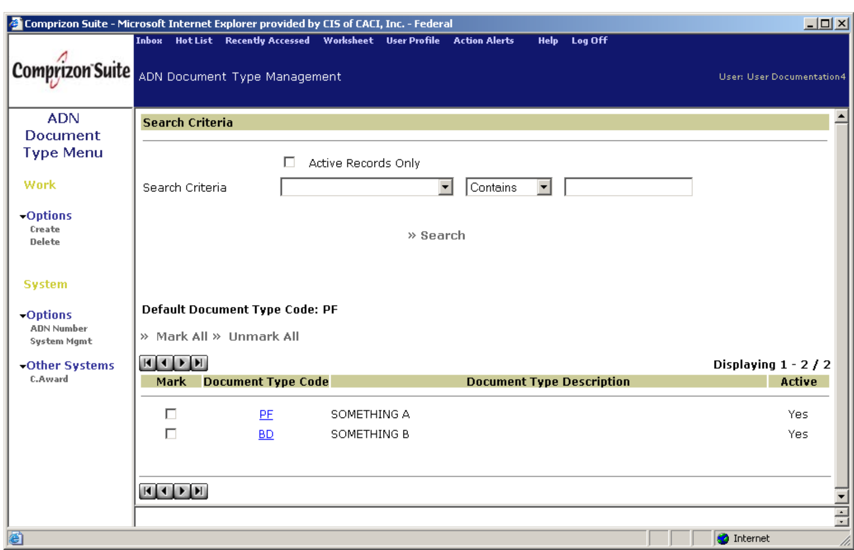


Figure 52. ADN Document Type Management Screen

4. ***To create a new ADN document type***:

   a. Select **Create** from the Options menu on the ADN Document Type Management screen. This will open the ADN Document Type Detail screen shown in Figure 53.

   b. Enter the **Document Type Code** and the **Document Type Description**.

   c. Select **Save**.

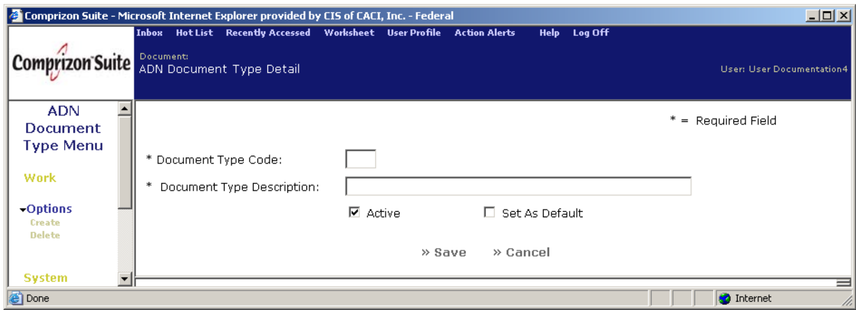


Figure 53. ADN Document Type Detail Screen

5. ***To edit an existing ADN document type***:

   a. Select that document type on the ADN Document Type Management screen. This will open the ADN Document Type Detail screen.

   b. Make any necessary changes to the **Document Type Description**.

   c. Select **Save**

6. ***To delete an existing ADN document type***:

   a. Mark the checkbox for that document type in the Mark column on the ADN Document Type Management screen.

   b. Select **Delete** from the Options menu.

NOTE: Document types may only be deleted if they are not being used on any documents.

TIP: Multiple entries can be deleted simultaneously by marking the checkboxes for all of the entries you wish to delete before selecting Delete.

Site Code Letters

The following steps describe how to manage ADN site code letters:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **ADN Numbers** from the PIINs & Numbers menu.

3. Next select **Site Code Letters** from the Options menu. This will open the ADN Site Code Management screen shown in Figure 54.

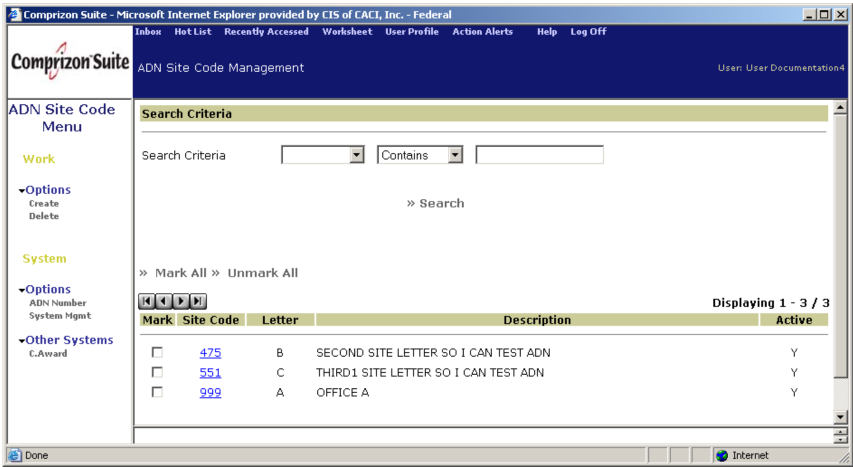


Figure 54. ADN Site Code Management Screen

4. ***To create a new ADN site code letter***:

    a. Select **Create** from the Options menu on the ADN Site Code Management screen. This will open the ADN Site Code Detail screen shown in Figure 55.

    b. Select the **Site Code** from the drop-down list, enter the **Letter Code** and the **ADN Description**.

    c. Select **Save**.

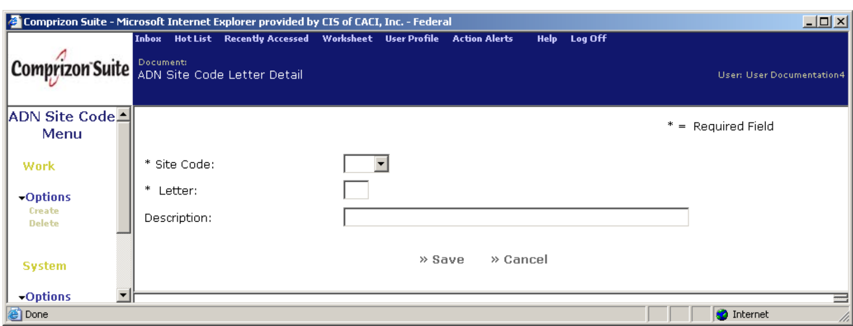


Figure 55. ADN Site Code Detail Screen

5. ***To edit an existing ADN site code letter:***

    a. Select that site code on the ADN Site Code Management screen. This will open the ADN Site Code Detail screen for that site code

    b. Make any necessary changes.

    c. Select **Save**

6. ***To delete an existing ADN site code letter***:

a. Mark the checkbox for that site code in the Mark column on the ADN Site Code Management screen.

b. Select **Delete** from the Options menu.

NOTE:	Document types may only be deleted if they are not being used on any documents.
TIP:	Multiple entries can be deleted simultaneously by marking the checkboxes for all of the entries you wish to delete before selecting Delete.

Counters

The following steps describe how to manage ADN counters:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **ADN Numbers** from the PIINs & Numbers menu.
3. Select **ADN Numbers** from the PIINs & Numbers menu on the System Management Menu.
4. Next select **Counters** from the Options menu. This will open the ADN Counter Management screen shown in Figure 56.

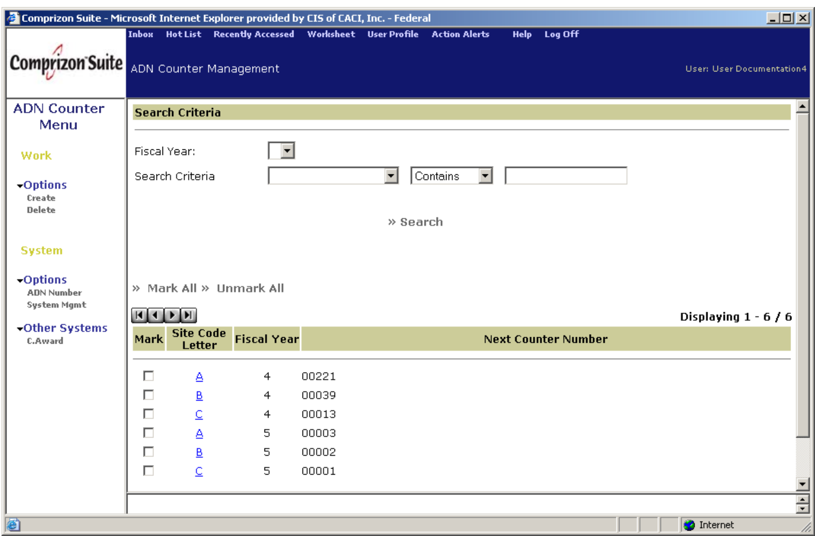


Figure 56. ADN Counter Management Screen

5. ***To create a new ADN counter***:

   a. Select **Create** from the Options menu on the ADN Counter Management screen. This will open the ADN Counter Detail screen shown in Figure 57.

   b. Select the **Site Code Letter** from the drop-down list, and then enter the **Fiscal Year** (last digit only) and the **Next Counter Number**.

   c. Select **Save** when you have finished.

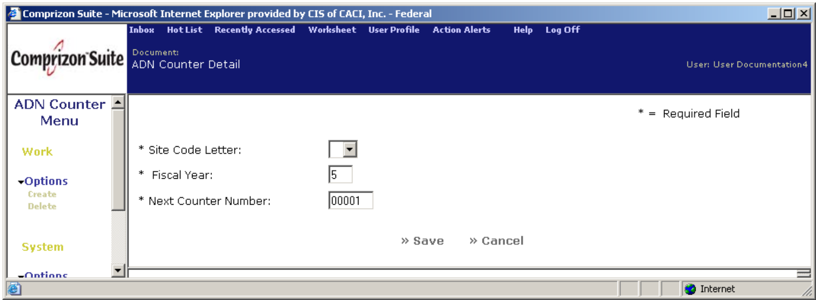


Figure 57. ADN Counter Detail Screen

6. ***To edit an existing ADN counter***:
   a. Select that counter on the ADN Counter Management screen. This will open the ADN Counter Detail screen.
   b. Make any necessary changes to the **Next Counter Number**.
   c. Select **Save**.

7. ***To delete an existing ADN counter***:
   a. Mark the checkbox for that counter in the Mark column on the ADN Counter Management screen.
   b. Select **Delete** from the Options menu.

NOTE: Counters may only be deleted if they are not being used on any documents.

TIP: Multiple counters can be deleted simultaneously by marking the checkboxes for all of the counters you wish to delete before selecting Delete.

ACCOUNTING

The System Administration module allows you to setup account codes for entire sites. Creating account codes consists of the following steps. Each step is described in greater detail in the following sections.

1. First create the account code segments. This consists of giving a segment a name and a length.
2. After creating an account code segment, possible values for the segment can be defined. Segment values can be added and maintained either before or after creating the accounting format.
3. After creating an account code segment, you can create the accounting format, which consists of a series of accounting segments. Creating accounting formats consists of defining the number of segments that will be contained in the format and then selecting what those segments will be.

After accounting formats have been defined, the System Administrator can set up account codes. Account codes are accounting formats for which specific values for the segments have been predefined.

Account Code Segments

The followings steps describe how to manage account segments:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Segments** from the Accounting menu. The Account Code Segments Management screen shown in Figure 58 displays.

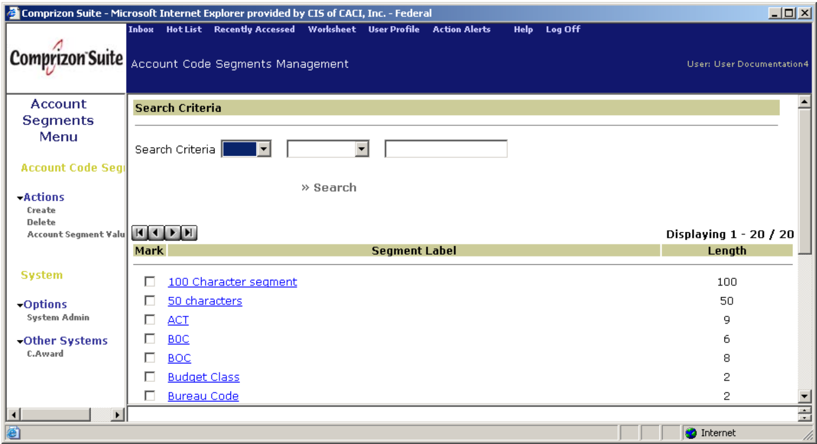


Figure 58. Account Code Segments Management Screen

3. ***To create an account code segment***:
   a. Select **Create** from the Actions menu. The Account Segment Detail screen shown in Figure 59 displays.
   b. Enter the **Segment Label Name** and the **Length**.
   c. Select **Save**.

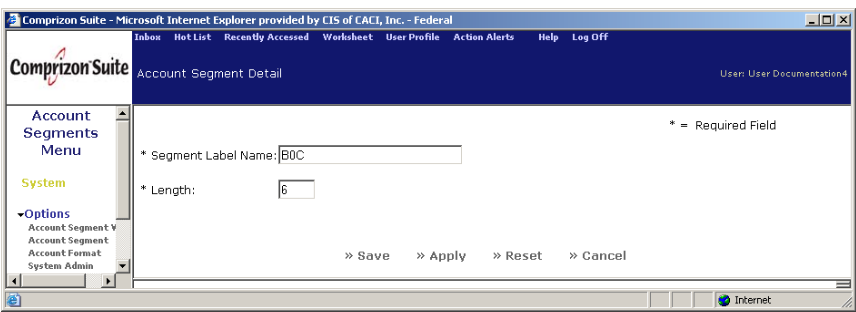


Figure 59. Account Segment Detail Screen

4. ***To edit an existing account code segment***:
   a. Select the link for the Segment Label from the Segment Label column.
   b. Make any necessary changes to the **Segment Label Name** and the **Length**.
   c. Select **Save**.

5. ***To delete an existing account code segment***:

   a. Mark the checkbox that corresponds to the account code segment.

   b. Select **Delete** from the Actions menu.

NOTE:	Only account code segments that are not currently in use may be deleted.
TIP:	Multiple entries can be deleted simultaneously by marking the checkboxes for all of the entries you wish to delete before selecting Delete.

Account Segment Values

The followings steps describe how to manually add account segment values. You may also load account segment values from a data file, as described in the next section.

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Segments** from the Accounting menu. The Account Code Segments Management screen shown in Figure 58 displays.
3. Mark the checkbox for the Segment Label that needs defined values.
4. Select **Account Segment Value**. The Account Segment Value Management screen shown in Figure 60 displays.

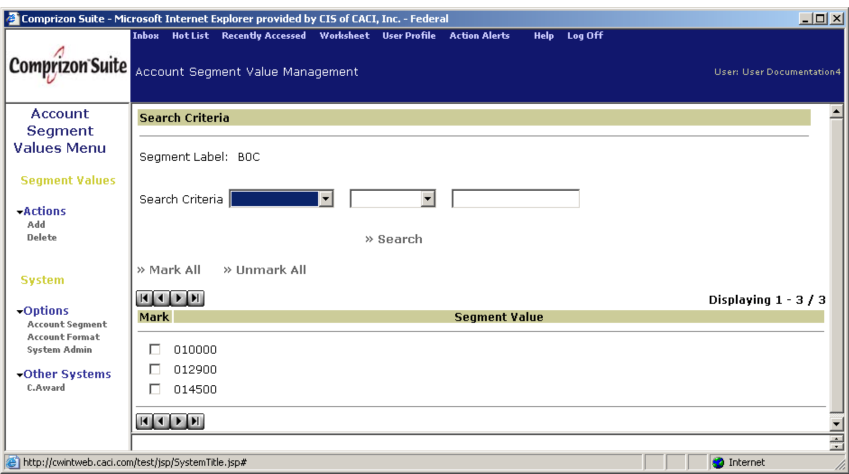


Figure 60. Account Segment Value Management Screen

5. ***To add the values for the selected account code segment***:

   a. Select **Add** from the Actions menu. The Account Segment Values screen shown in Figure 61 displays.

   b. Enter each value for this segment on a separate field on the screen.

   c. Select **Save**.

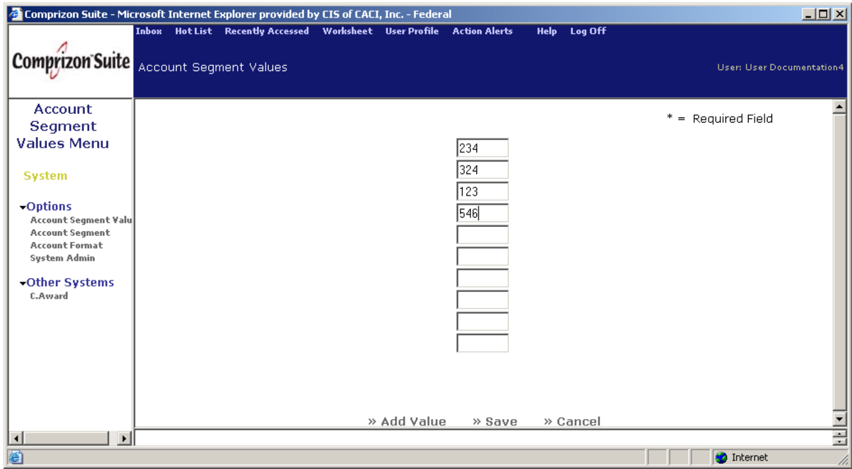


Figure 61. Account Segment Values Screen

6. ***To delete values for the selected account code segment***:
   a. Mark the checkbox for that value in the Mark column.
   b. Select **Delete** from the Actions menu.

Load Account Code Segment Values

The Load Accountenable the system administrator to load values for account code segments from an excel spreadsheet into the Comprizon.Suite database.

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Segments** from the Accounting menu. The Account Code Segments Management screen shown in Figure 58 displays.
3. Select **Load Segment Values** from the Tools menu. This will open the Load Segment Values screen shown in Figure 62.
4. Use the **Browse** button to navigate to and select the Excel file with the segment values.
5. You may mark the checkbox if you wish for existing segment values to be deleted before loading the file.
6. Select **Save**.
7. To check the status of the load, return to the Account Code Segments Management screen and select **Check Status** from the Tools menu. This will open the Load Segment Values Status screen. You may delete an entry from this screen by marking the checkbox and selecting **Delete** from the Actions menu.

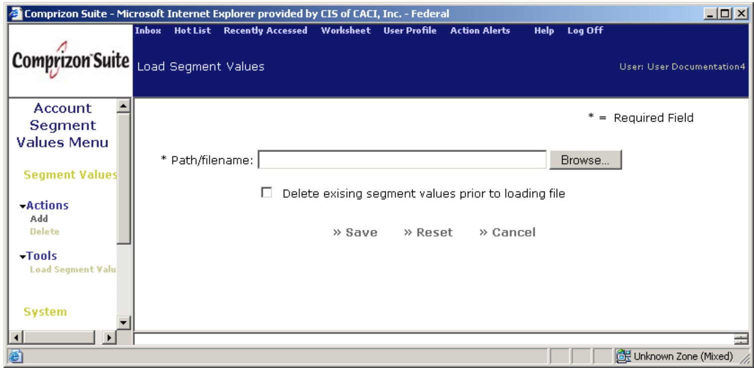


Figure 62. Account Segment Values Screen

Account Formats

The following steps describe how to manage account formats:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Formats** from the Accounting menu. The Account Code Format Management screen shown in Figure 63 displays.

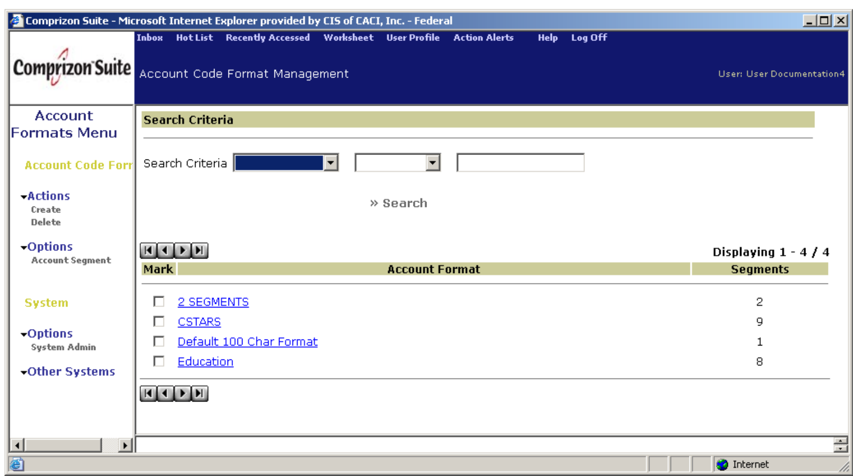


Figure 63. Account Code Format Management Screen

3. ***To create a new account format***:

   a. Select **Create** from the Actions menu on the Account Code Format Management screen. The Account Format Detail screen displays. This screen consists of the following two tabs: Account Format (Figure 64) and Segments (Figure 65).

   b. First use the Account Format tab to enter the **Format Name** and use the drop-down list provided in the **Account Format** field to indicate the number of segments for the new format. If applicable, select the segment that will include the BOC from the drop-down list in the **BOC Segment** field.

c. After you have assigned the name and number of segments, use the Segments tab to assign the contents of each segment by selecting the correct value for each segment from the corresponding drop-down list.

d. Select **Save** to save the information.

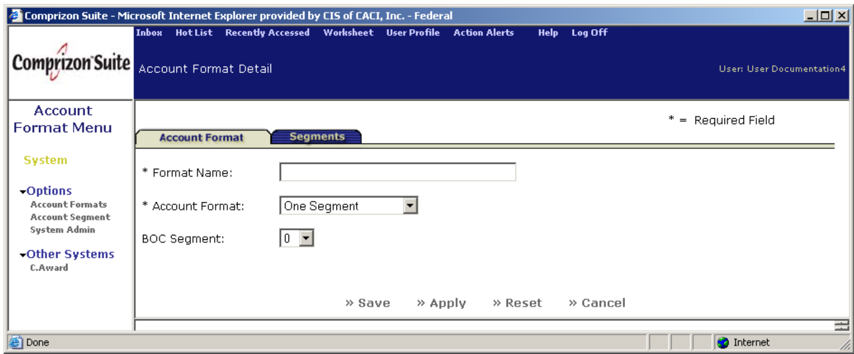


Figure 64. Account Format Detail Screen - Account Format Tab

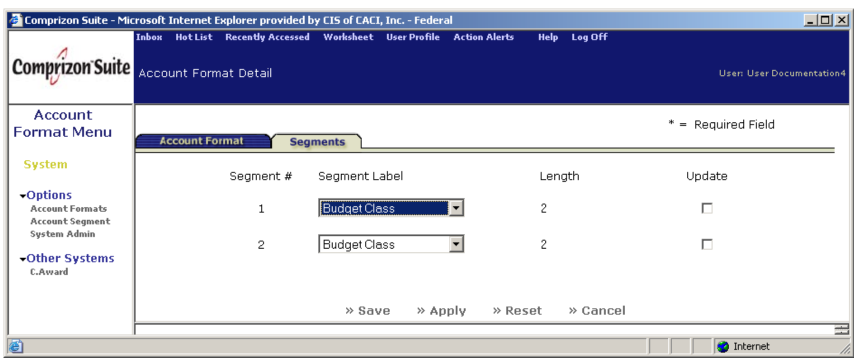


Figure 65. Account Format Detail Screen - Segments Tab

4. ***To edit an existing account format:***

   a. Select the format's link in the Account Format column on the Account Code Format Management screen. The Account Format Detail Screen displays.

   b. Make any necessary changes.

   c. Select **Save** to save the changes.

5. ***To delete an existing account format:***

   a. Mark that format's checkbox in the Mark column on the Account Code Format Management screen.

   b. Select **Delete** from the Actions menu.

TIP: Multiple entries can be deleted simultaneously by marking the checkboxes for all of the entries you wish to delete before selecting Delete.

Account Codes

Comprizon Suite allows administrators to setup and maintain pre-defined account codes for use by users. Administrators define the values for each account segment, and then users may edit as necessary. The following steps describe how to manage account codes:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **Account Codes** from the Accounting menu. The Account Code Management screen shown in Figure 66 displays.

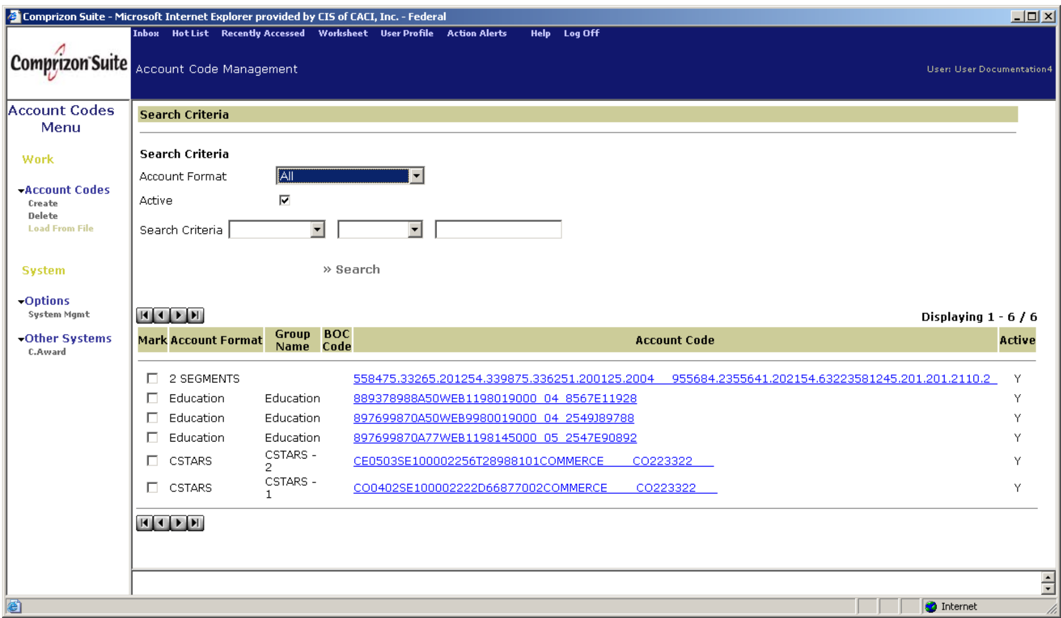


Figure 66. Account Code Management Screen

3. ***To create a new account code:***
   a. Select the appropriate format from the drop-down list in the **Account Format** field on the Account Code Management screen.
   b. Select **Create** from the Account Codes menu. An Account Code Detail screen similar to the one shown in Figure 67 displays.
   c. Enter the **Group Name** and, if applicable, either enter the **BOC Code** either manually or by using the Lookup (Magnifying Glass) to search for and select a BOC Code. A checkmark in the **Active** field indicates that the account code will be active once created; remove this checkmark if you wish for the code to remain inactive after it is created.
   d. Assign values to each of the segments in the account code. Each segment will be listed in the Account Code section of the screen. For each segment Label Name, there is a corresponding Label Value field that is used to select the appropriate value for the segment. Either enter the values manually, or use the corresponding Lookup (Magnifying Glass) to search for and select the appropriate values.
   e. Select **Save** to save changes.

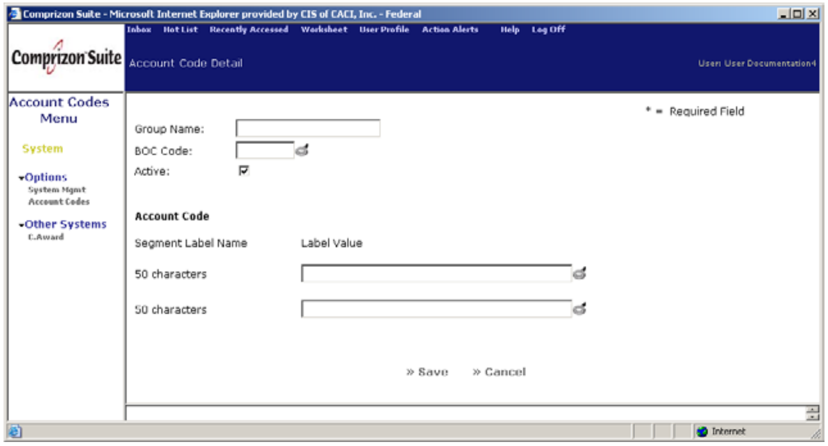


Figure 67. Account Code Detail Screen

4. ***To edit an existing account code:***
   a. Select that code's link in the Account Code column on the Account Code Management screen. The Account Code Detail Screen will display.
   b. Make any necessary changes.
   c. Select **Save** to save the changes.

5. ***To delete an existing account code:***
   a. Mark the checkbox in Mark column on the Account Code Management screen for the account code to be deleted.
   b. Select **Delete** from the Account Codes menu.

TIP: Multiple entries can be deleted simultaneously by marking the checkboxes for all of the entries you wish to delete before selecting Delete.

BOC Codes

The following steps describe how to manage account codes:

1. From the Purchasing/Contracting Main menu select **System Admin** > **System Mgmt**. This will open the System Management Menu.
2. Select **BOC Codes** from the Accounting menu within the System Management Menu. The Budget Object Code Management screen shown in Figure 68 displays.

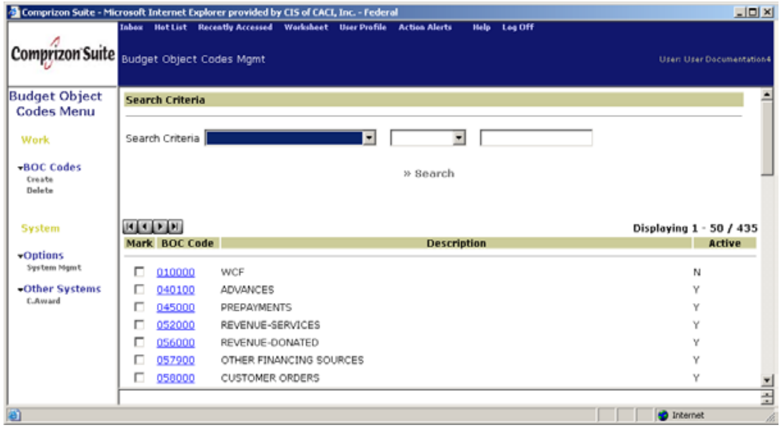


Figure 68. Budget Object Code Management Screen

3. ***To create a BOC code***:
   a. Select **Create** from the BOC Codes menu on the Budget Object Code Management screen. The Budget Object Code Detail screen shown in Figure 69 displays.
   b. Enter a name in the **Code** field and, optionally, a description in the **Description** field. A checkmark in the **Active** field indicates that the BOC code will be active once saved; remove this checkmark if you wish for the code to remain inactive after it is saved.
   c. Select **Save** to save changes.

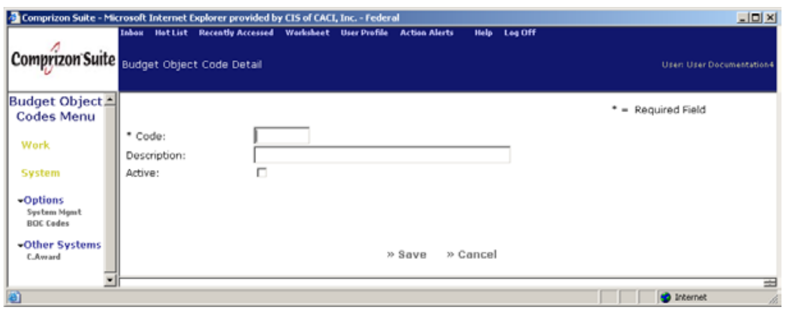


Figure 69. Budget Object Code Detail Screen

4. ***To edit an existing BOC code***:
   a. Select that code's link in the BOC Code column. The Budget Object Code Detail screen displays.
   b. Make any necessary changes to the **Description** and/or **Active** fields.
   c. Select **Save**.
5. ***To delete an existing BOC Code record***:
   a. Mark the checkbox for that code in the Mark column.
   b. Select **Delete** from the BOC Codes menu.

TIP: Multiple entries can be deleted simultaneously by marking the checkboxes for all of the entries you wish to delete before selecting Delete.

Chapter 4

DATA MANAGEMENT

IN THIS SECTION…

DATA MANAGEMENT OVERVIEW

The Data Management option available from the Options menu in the System Administration Menu allows you to input the values for codes, addresses, etc., that are used in the Lookup screens and drop-down lists.

ADDRESSES

The Addresses option found in the Options menu within the Data Management Menu allows you to input the addresses information that will be used in lookups throughout the system (e.g., Contracting Office, Ultimate Destination). The following steps describe how to manage addresses:

1. From the Purchasing/Contracting Main menu select **System Admin** > **Data Mgmt**. This will open the Data Management Menu.
2. Select **Addresses** from the Options menu. This will open the Addresses Mgmt screen shown in Figure 70.

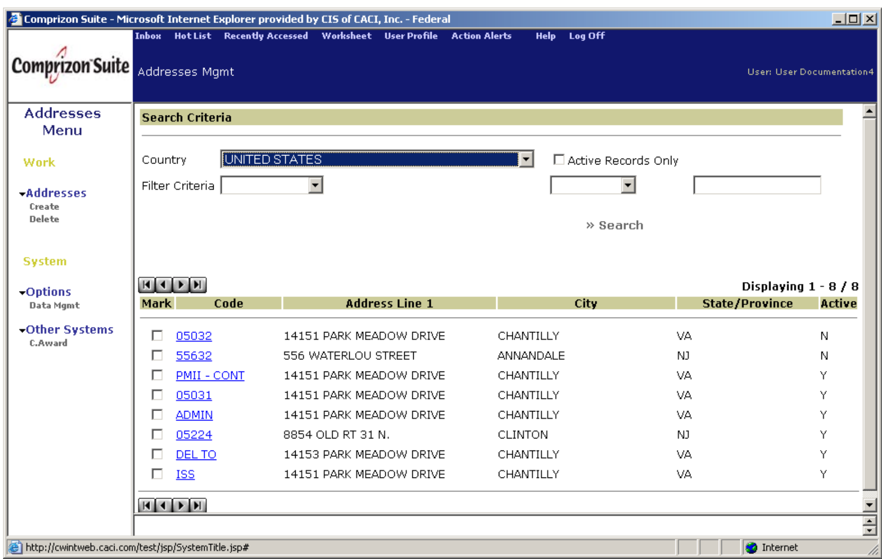


Figure 70. Addresses Mgmt Screen

3. ***To create a new address***:

   a. Select **Create** from the Addresses menu on the Addresses Mgmt screen. This will open the Addresses Detail screen shown in Figure 71.

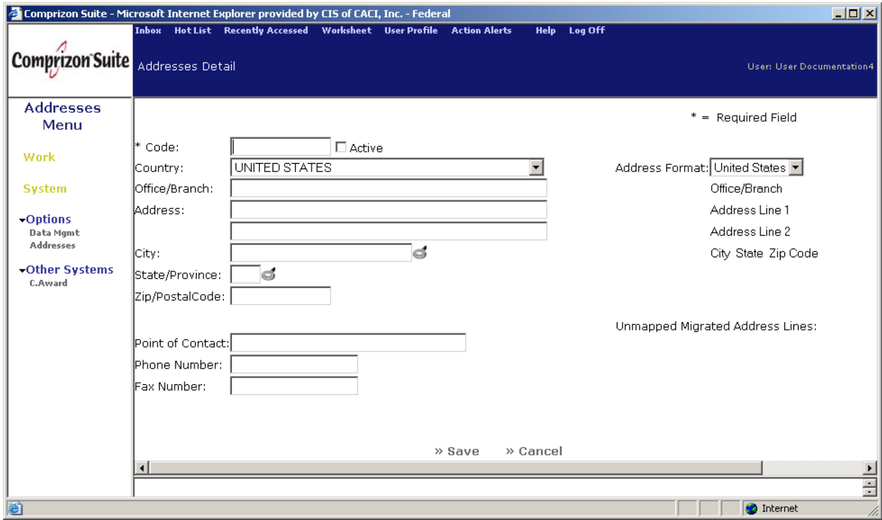


Figure 71. Addresses Detail Screen

b. Enter the information as described in Table 15.

c. Select **Save** to save the information.

4. ***To edit an existing address:***

   a. Select the address code in the Code column on the Addresses Mgmt screen. This will open the Addresses Detail screen for the address you selected.

   b. Make any necessary changes.

   c. Select **Save** to save changes.

5. ***To delete an existing address:***

The system allows you to delete an address code that is not used in the system (i.e., is not associated with a procurement document). This will prevent the address from displaying on drop-down lists in the system. If desired, you can reactivate an address code by editing its active flag.

NOTE: You will not be allowed to delete an address code that is being used; instead, the system will update the address code's status to Inactive. This will prevent the address from displaying on drop-down lists in the system, and users will not be allowed to save an inactive address when they create or edit a document

The following steps describe how to delete an existing address:

a. Mark the checkbox for that address in the Mark column on the Team Management screen.

b. Select **Delete** from the Addresses menu.

TIP: Multiple entries can be deleted simultaneously by marking the checkboxes for all of the entries you wish to delete before selecting Delete.

Table 15. Address Detail Screen Field Descriptions

Field	Description
Code	Enter the unique code that will identify this address.
Active	Mark this checkbox if you wish the address to become active upon creation (i.e., available to the user in lookups). Unmark the checkbox if you wish the address to remain inactive after it is created.
Country	Select the appropriate country from the drop-down list provided.
Address Format	Select the appropriate address format from the drop-down list provided to indicate how the data will display on the screen and how it will be printed.
Office/Branch	Enter the name of the office or branch.
Address	Enter the address. Two lines are provided for entering the data.
City	Enter the city, or use the Lookup (Magnifying Glass) to search for and select the city.
State/Province	Enter the two-letter abbreviation for the state/province, or use the Lookup (Magnifying Glass) to select the state.
Zip/Postal Code	Enter the zip code or postal code.
Point of Contact	Enter the name of the main Point of Contact for this address.
Phone Number	Enter a telephone number for the address.
Fax Number	Enter a fax number for the address.

CITY-STATE CODES

The City-State Code option found in the Options menu within the Data Management Menu allows you to manage codes that represent certain cities. The following steps describe how to manage addresses:

1. From the Purchasing/Contracting Main menu select **System Admin** > **Data Mgmt**. This will open the Data Management Menu.
2. Select **City-State Code** from the Options menu. This will open the City-State Code Mgmt screen shown in Figure 72.

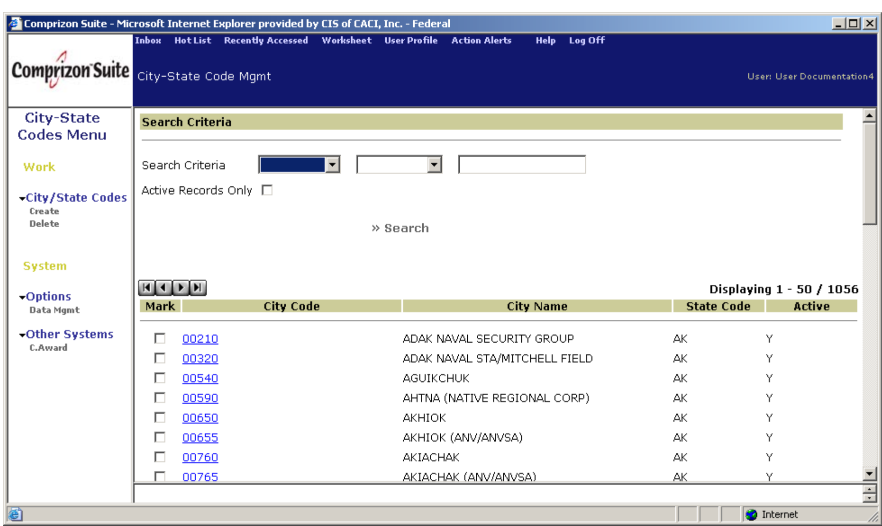


Figure 72. City-State Code Mgmt Screen

3. ***To create a new city-state code***:

   a. Select **Create** from the City/State Codes menu on the City-State Code Mgmt screen. This will open the City-State Code Detail screen shown in Figure 73.

   b. Enter the information as described in

Table 16.

c. Select **Save** to save the information.

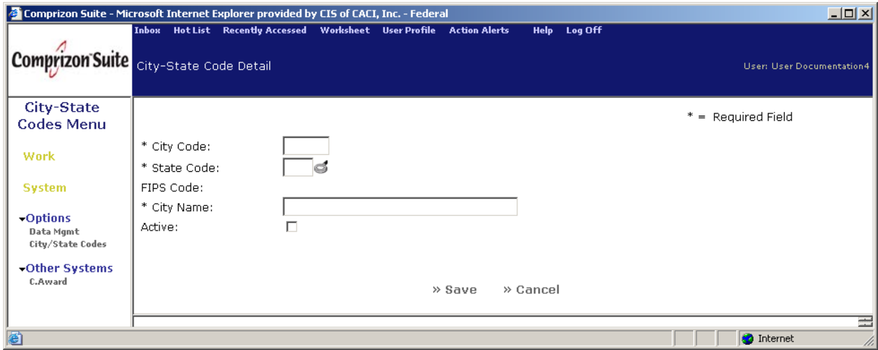


Figure 73. City-State Code Detail Screen

4. ***To edit an existing city-state code***:

   a. Select the code in the Code column on the City-State Code Mgmt screen. This will open the City-State Detail screen for the code you selected.

   b. Make any necessary changes.

   c. Select **Save** to save changes.

5. ***To delete an existing city-state code***:

   a. Mark the checkbox for that code in the Mark column on the City-State Code screen.

   b. Select **Delete** from the City-State Codes menu.

NOTE: You will not be allowed to delete a city-state code that is being used; instead, the system will update the code's status to Inactive. This will prevent the address from displaying on drop-down lists in the system, and users will not be allowed to save an inactive code when they create or edit a document.

TIP: Multiple codes can be deleted simultaneously by marking the checkboxes for all of the codes you wish to delete before selecting Delete.

Table 16. City-State Code Detail Screen Field Descriptions

Field	Description
City Code	Enter the city code. The city code must be unique for the city/state combination.
State Code	Enter the two-letter abbreviation for the state, or use the Lookup (Magnifying Glass) to search for and select the state abbreviation
FIPS Code	If you used the Lookup to select the state code, this screen will display the FIPS code associated with the state.
City Name	Enter the full city name.
Active	Mark this checkbox if you wish the city-state code to become active upon creation (i.e., available to the user in lookups). Unmark the checkbox if you wish the city-state code to remain inactive after it is created.

COUNTRY CODES

The Country Codes option found in the Options menu within the Data Management Menu allows you to input codes that represent certain countries. The following steps describe how to manage country codes:

1. From the Purchasing/Contracting Main menu select **System Admin** > **Data Mgmt**. This will open the Data Management Menu.
2. Select Country Codes from the Options menu. This will open the Country Code Management screen shown in Figure 74.

Figure 74. Country Code Management Screen

3. ***To create a new country code***:
   a. Select **Create** from the Country Codes menu on the Country Code Management screen. This will open the Country Code Detail screen shown in Figure 75.
   b. Enter the information as described in Table 17.
   c. Select **Save** to save the information.

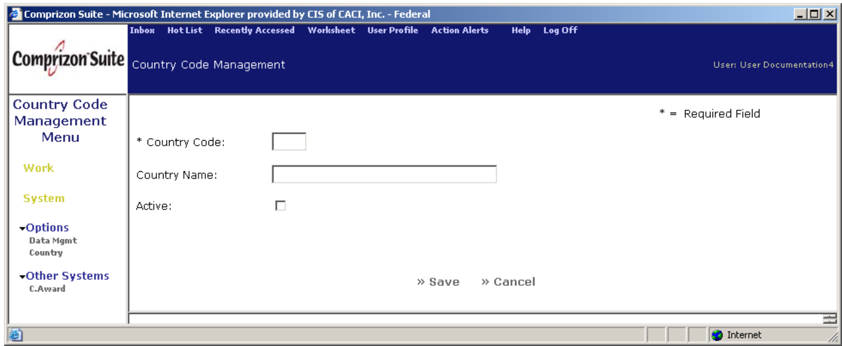


Figure 75. Country Code Detail Screen

4. ***To edit an existing code***:
   a. Select the code in the Code column on the Country Code Management screen. This will open the Country Code Detail screen for the code you selected.
   b. Make any necessary changes.
   c. Select **Save** to save the changes.

5. ***To delete an existing code***:
   a. Mark the checkbox for that code in the Mark column on the Country Code Management screen.
   b. Select **Delete** from the Country Codes menu.

NOTE: You will not be allowed to delete a country code that is being used; instead, the system will update the code's status to Inactive. This will prevent the code from displaying on drop-down lists in the system, and users will not be allowed to save an inactive code when they create or edit a document

TIP: Multiple codes can be deleted simultaneously by marking the checkboxes for all of the codes you wish to delete before selecting Delete.

Table 17. Country Code Detail Screen Field Descriptions

Field	Description
City Code	Enter the code you wish to use for the country.
Country Name	Enter the country name.
Active	Mark this checkbox if you wish for the code to become active upon creation. Unmark this checkbox to have the code remain inactive after it is created.

COURSES

The Courses option found in the Options menu within the Data Management Menu allows you to define courses. The following steps describe how to manage courses:

1. From the Purchasing/Contracting Main menu select **System Admin** > **Data Mgmt**. This will open the Data Management Menu.

2. Select **Courses** from the Options menu. This will open the Master Courses Management screen shown in Figure 76.

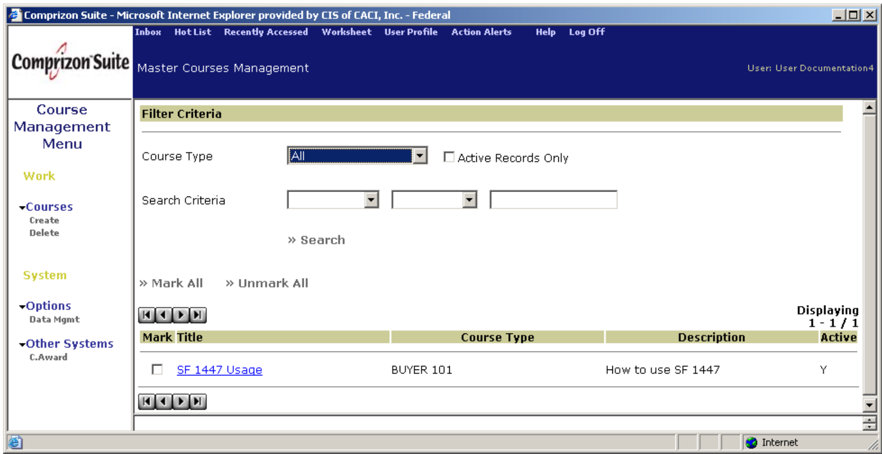


Figure 76. Master Courses Management Screen

3. ***To create a new course***:

   a. Select **Create** from the Courses menu on the Master Courses Management screen. This opens the Creates - Edits Master Courses screen shown in Figure 77.

   b. Enter the information as described in Table 18.

   c. When you have finished entering information, select **Save**.

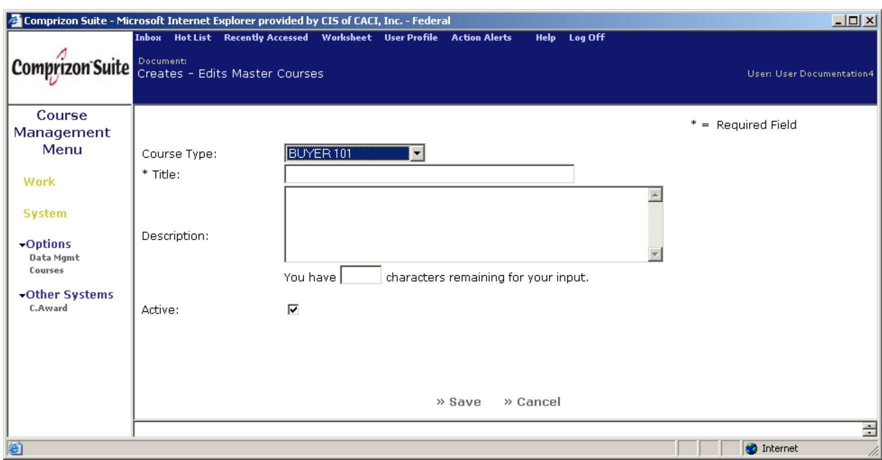


Figure 77. Creates - Edits Master Courses Screen

4. ***To edit an existing course***:
   a. Select the link for the course on the Master Courses Management screen. This will open the Create – Edits Master Courses screen.
   b. Make any necessary changes.
   c. Select **Save** to save changes.

5. ***To delete an existing course***:
   a. Mark that course's checkbox in the Mark column on the Master Courses Management screen.
   b. Select **Delete** from the Courses menu.

NOTE: You will not be allowed to delete a course that is being used; instead, the system will update the course's status to Inactive. This will prevent the code from displaying on lookups.

TIP: Multiple courses can be deleted simultaneously by marking the checkboxes for all of the courses you wish to delete before selecting Delete.

Table 18. Creates - Edits Master Courses Screen Field Descriptions

Field	Description
Course Type	Select the Course Type from the drop-down list provided.
Title	Enter the title for the course.
Description	If desired, enter a description of the course.
Active	Mark this checkbox to indicate that the course should become active upon creation (i.e., available to user in lookups). Unmark the checkbox for the course to remain inactive upon creation.

DOCUMENT TYPES

The Document Types option found in the Options menu within the Data Management Menu allows you to define the various types of courses, government property documents, and support documents. The following steps describe how to manage document types:

1. From the Purchasing/Contracting Main menu select **System Admin** > **Data Mgmt**. This will open the Data Management Menu.
2. Select **Document Types** from the Options menu. This will open the Document Type Management screen shown in Figure 78.

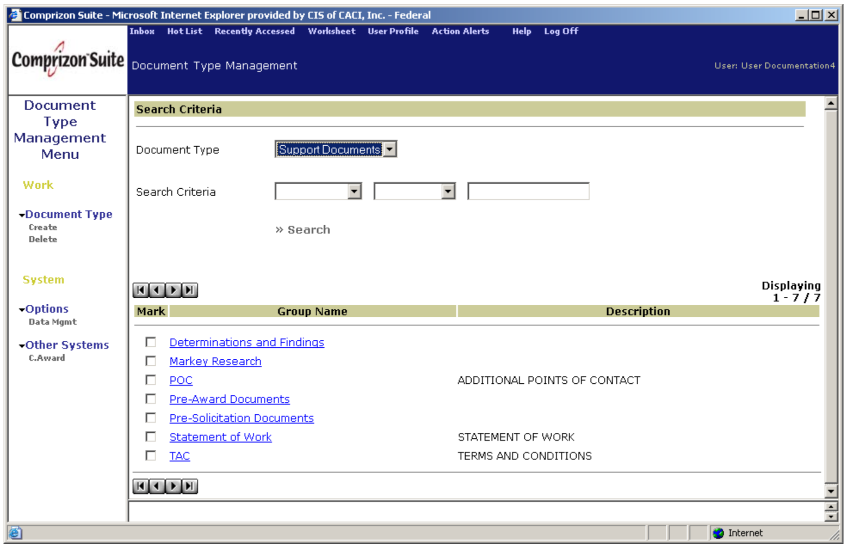


Figure 78. Document Type Management Screen

3. ***To create a new document type***:

   a. Select **Create** from the Document Type menu on the Document Type Management screen. This will open the Document Type Detail screen shown in Figure 79.

   b. Enter the information as described in Table 19.

   c. Select **Save** to save the information.

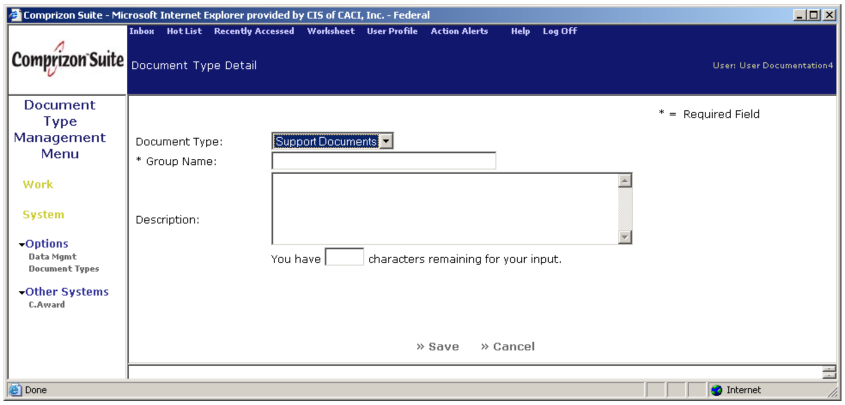


Figure 79. Document Type Detail Screen

4. ***To edit an existing document type***:

   a. Select the corresponding group name on the Document Type Management screen. This will open the Document Type Detail screen for the document type you selected.

   b. Make any necessary changes.

   c. Select **Save** to save changes.

5. ***Delete an Existing Document Type***

   The system allows you to delete document types only if they are not being used in the system. The following steps describe how to delete an existing document type:

   a. Mark the appropriate checkbox on the Document Type Management screen.

   b. Select **Delete** from the Document Type menu.

NOTE: The system does not allow you to delete a document that is in use in the system; instead, the system marks the document type as inactive and does not allow users to select the document type from drop-down lists. Once a document type is made inactive, it cannot be reactivated.

TIP: Multiple entries can be deleted simultaneously by marking the checkboxes for all of the entries you wish to delete before selecting Delete.

Table 19. Document Type Detail Screen Field Descriptions

Field	Description
Document Type	Select the appropriate document type from the drop-down list provided.
Group Name	Enter the group name.
Description	Enter a description of the document type. A counter below this field indicates the maximum number of character remaining for the description.

FSC/PSC CODES

FSC (Federal Supply Classification) codes are four-digit numeric codes used by the government to classify products into groups and classes according to physical or performance characteristics. PSC (Product Service Classification) codes are four-character alphanumeric codes used by the government to classify services into groups and classes according to characteristics and types of service.

The following steps describe how to manage FSC/PSC codes:

1. From the Purchasing/Contracting Main menu select **System Admin** > **Data Mgmt**. This will open the Data Management Menu.
2. Select **FSC/PSC Codes** from the Options menu. This will open the FSC/PSC Mgmt screen shown in Figure 80.

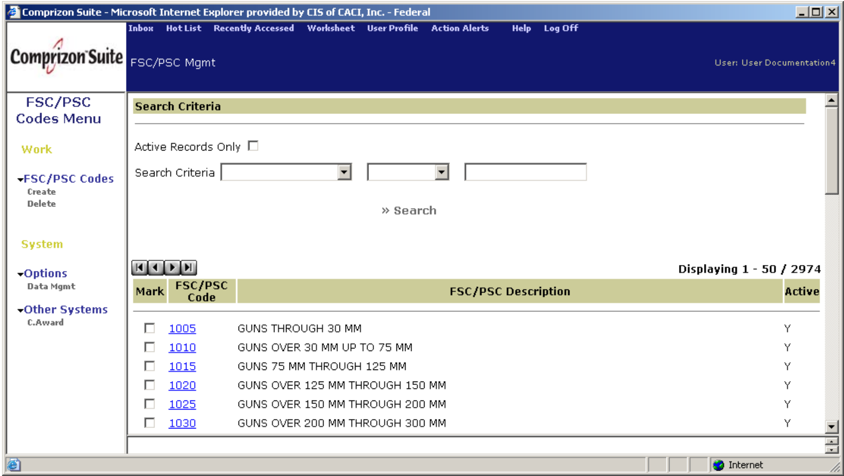


Figure 80. FSC/PSC Mgmt Screen

3. ***To create a new FSC/PSC code***:

   a. Select **Create** from the FSC/PSC Codes menu on the FSC/PSC Mgmt screen. This will open the FSC/PSC Detail screen shown in Figure 81.

   b. Enter a unique **FSC/PSC Code** and, if desired, the **FSC/PSC Description**.

   c. Mark the **Active** checkbox if you wish the code to become active upon creation (i.e., available to the user in lookups). Unmark this checkbox if you wish the code to remain inactive after it is created.

   d. When you have finished, select **Save**.

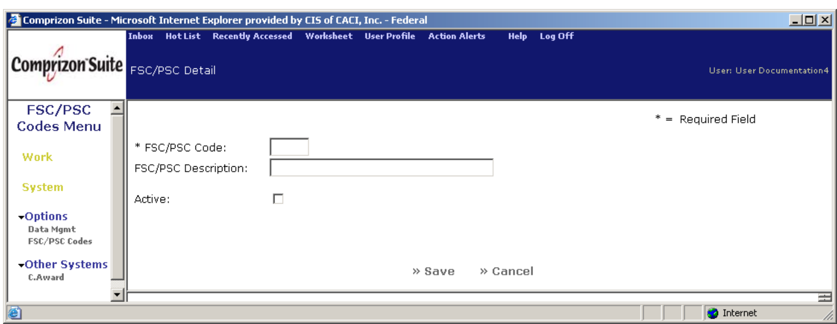


Figure 81. FSC/PSC Detail Screen

4. ***To edit an existing code***:

   a. Select the code in the FSC/PSC Code column on the FSC/PSC Mgmt screen. This will open the FSC/PSC Detail screen for the code you selected.

   b. Make any necessary changes.

   c. Select **Save** to save changes.

5. ***To delete an existing code***:

   a. Mark the checkbox for that code in the Mark column on the FSC/PSC Mgmt screen.

   b. Select **Delete** from the FSC/PSC Codes menu.

NOTE: The system does not allow you to delete a code that is in use in the system; instead, the system marks the code as inactive and does not allow users to select the code from drop-down lists. Once a code is made inactive, it cannot be reactivated.

TIP: Multiple codes can be deleted simultaneously by marking the checkboxes for all of the codes you wish to delete before selecting Delete.

HOLIDAYS

The Holidays option found in the Options menu within the Data Management Menu allows you to define holidays for use in calculating dates in project plans. The following steps describe how to manage holidays:

1. From the Purchasing/Contracting Main menu select **System Admin** > **Data Mgmt**. This will open the Data Management Menu.
2. Select **Holidays** from the options menu. This will open the Holidays Management screen shown in Figure 82.

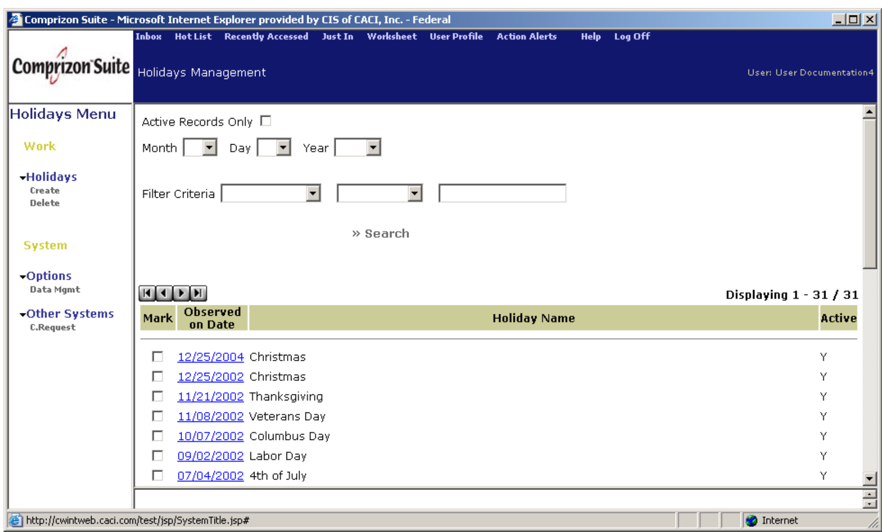


Figure 82. Holiday Management Screen

3. ***To create a new holiday***:

   a. Select **Create** from the Holidays menu on the Holidays Management screen. This will open the Holidays Detail screen shown in Figure 83.

   b. Enter the Holiday Observed on Date either by entering it manually in the MM/DD/YYYY format, or by using the Calendar to search for and select the date. Next, if desired, enter the **Holiday Name**.

c. Mark the **Active** checkbox if you wish the holiday to become active upon creation (i.e., available to the user in lookups). Unmark this checkbox if you wish the holiday to remain inactive after it is created.

d. When you have finished, select **Save**.

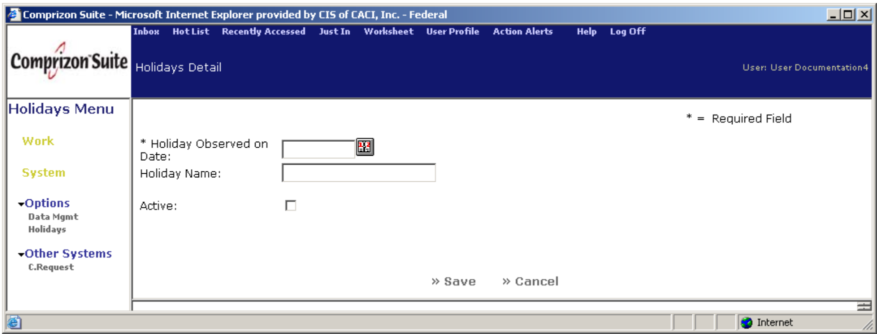


Figure 83. Holidays Detail Screen

4. ***To edit an existing holiday***:

   a. Select the corresponding date from the Observed on Date column on the Holidays Management screen. This will open the Holidays Detail screen for the holiday you selected.

   b. Make any necessary changes.

   c. Select **Save** to save changes.

5. ***Delete an Existing Holiday***:

   a. Mark the appropriate checkbox on the Holidays Management screen.

   b. Select **Delete** from the Holidays menu.

TIP: Multiple holidays can be deleted simultaneously by marking the checkboxes for all of the holidays you wish to delete before selecting Delete.

MASTER EVENTS

Master events are events that appear in the Event Title Lookup (Magnifying Glass) when users are adding events to project plans. The following steps describe how to manage master events:

1. From the Purchasing/Contracting Main menu select **System Admin** > **Data Mgmt**. This will open the Data Management Menu.

2. Select **Master Events** from the Options menu. This will open the Manages Master Events screen shown in Figure 84.

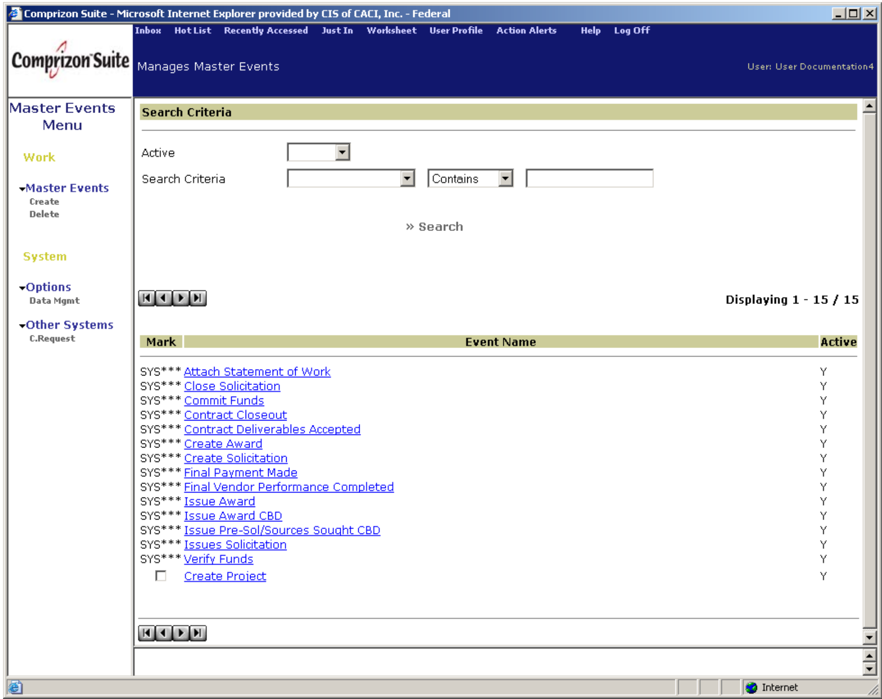


Figure 84. Manages Master Events Screen

3. ***To create a new master event***:

   a. Select **Create** from the Master Events menu on the Manages Master Events screen. This will open the Creates/Edits Master Events screen shown in Figure 85.

   b. Enter the **Event Name**.

   c. Mark the **Active** checkbox if you wish the event to become active upon creation (i.e., available to the user in lookups). Unmark this checkbox if you wish the event to remain inactive after it is created.

   d. When you have finished, select **Save**.

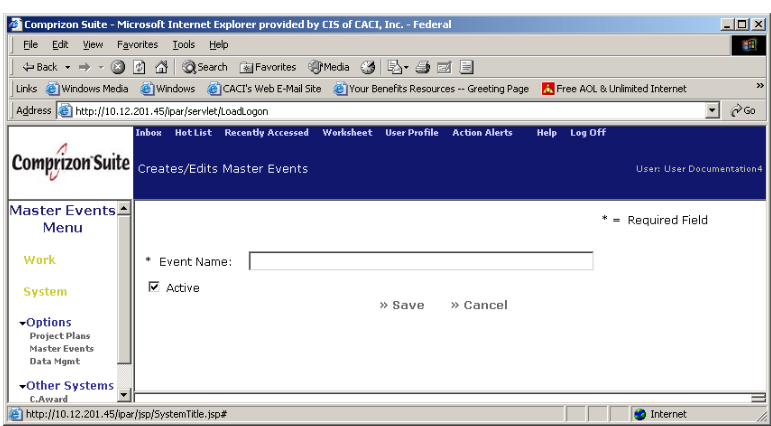


Figure 85. Creates/Edits Master Events Screen

4. ***To edit an existing master event:***
   a. Select the corresponding event from the Event Name column on the Manages Master Events screen. This will open the Creates/Edits Master Events screen for the event you selected.
   b. Make any necessary changes.
   c. Select **Save** to save changes.
5. ***To delete an existing master event:***
   a. Mark the appropriate checkbox on the Manages Master Events screen.
   b. Select **Delete** from the Master Events menu.

NOTE: System-defined master events are marked with "SYS***" in the Mark column on the Manages Master Events screen. These events cannot be deleted. Also, the system will not allow you to delete a master event that is currently used on a project plan; instead, the system will mark the event as Inactive so that it is not available in the drop-down list for users.

TIP: Multiple holidays can be deleted simultaneously by marking the checkboxes for all of the holidays you wish to delete before selecting Delete.

NAICS CODES

The North American Industry Classification System (NAICS) codes are standard six-digit codes used by the government to identify the types of goods or services a vendor provides.

The following steps describe how to manage NAICS codes:

1. From the Purchasing/Contracting Main menu select **System Admin** > **Data Mgmt**. This will open the Data Management Menu.
2. Select **NAICS Codes** from the Options menu. This will open the NAICS Mgmt screen shown in Figure 86.

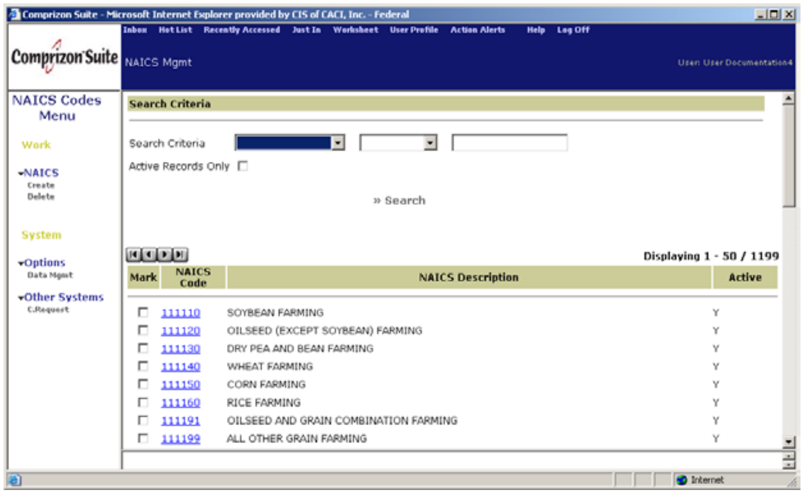


Figure 86. NAICS Mgmt Screen

3. ***To create a new NAICS code:***

   a. Select **Create** from the NAICS menu on the NAICS Mgmt screen. This will open the NAICS Detail screen shown in Figure 87.

   b. Enter the information as described in Table 20.

   c. Select **Save** to save the information.

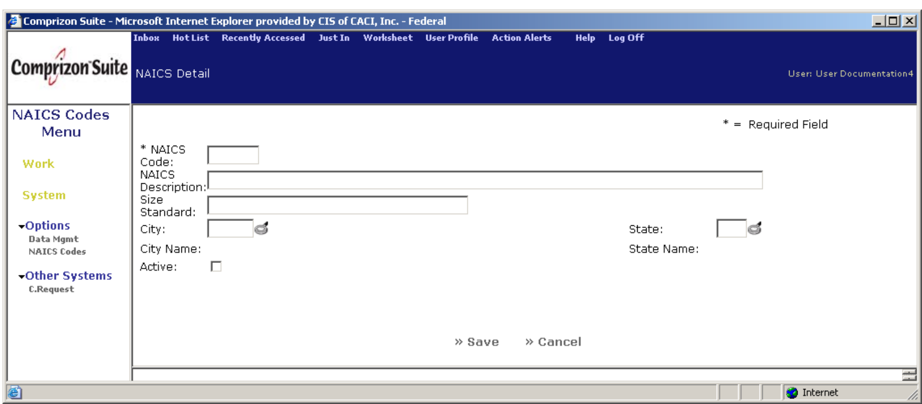


Figure 87. NAICS Detail Screen

4. ***To edit an existing NAICS code***:
   a. Select the code in the NAICS Code column on the NAICS Mgmt screen. This will open the NAICS Detail screen for the code you selected.
   b. Make any necessary changes.
   c. Select **Save** to save changes.

5. ***To delete an existing NAICS code***:
   a. Mark the checkbox for that code in the Mark column on the NAICS Mgmt screen.
   b. Select **Delete** from the NAICS menu.

NOTE: The system does not allow you to delete a code that is in use in the system; instead, the system marks the code as inactive and does not allow users to select the code from drop-down lists.

TIP: Multiple codes can be deleted simultaneously by marking the checkboxes for all of the codes you wish to delete before selecting Delete.

Table 20. NAICS Detail Screen Field Descriptions

Field	Description
NAICS Code	Enter the NAICS code.
NAICS Description	Enter the NAICS description.
Size Standard	Enter the size standard.
City	Enter the city code manually, or use the Lookup (Magnifying Glass) to search for and select the city.
State	Enter the state abbreviation manually, or use the Lookup (Magnifying Glass) to search for and select the state.
Active	Mark this checkbox if you wish the code to become active upon creation (i.e., available to the user in lookups). Unmark this checkbox if you wish the code to remain inactive after it is created.

STOCK ITEMS

The following steps describe how to manage stock items:

1. From the Purchasing/Contracting Main menu select **System Admin** > **Data Mgmt**. This will open the Data Management Menu.
2. Select **Stock Items** from the Options menu. This will open the Stock Item Mgmt screen shown in Figure 88.

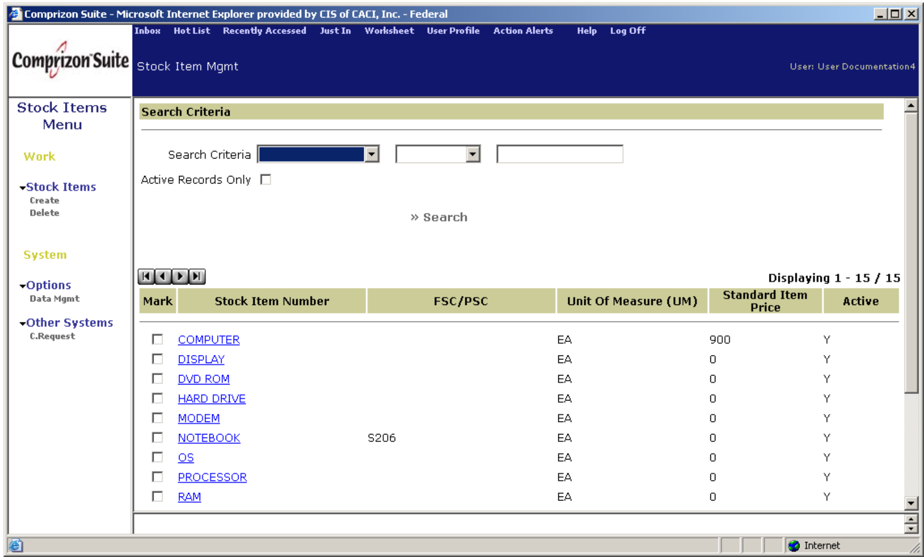


Figure 88. Stock Item Mgmt Screen

3. ***To create a new stock item***:
   a. Select **Create** from the Stock Items menu on the Stock Item Mgmt screen. This will open the Stock Item Detail screen shown in Figure 89.
   b. Enter the information as described in Table 21.
   c. Select **Save** to save the information.

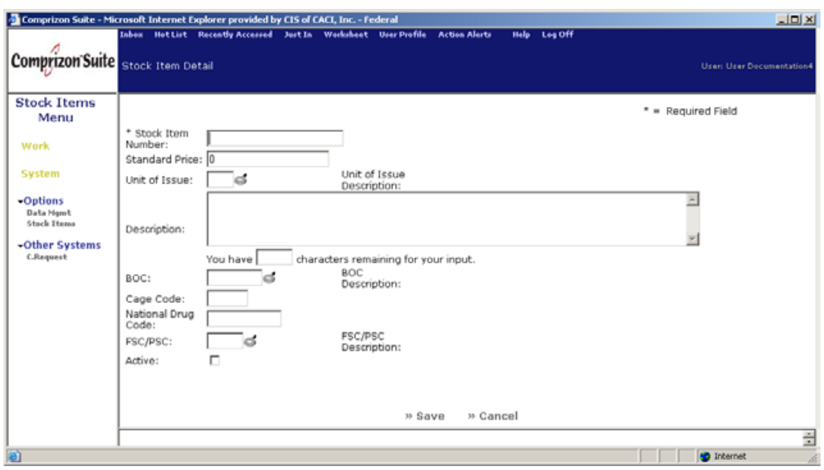


Figure 89. Stock Item Detail Screen

4. ***To edit an existing stock item***:
   a. Select the number in the Stock Item Number column on the Stock Item Mgmt screen. This will open the Stock Item Detail screen for the item you selected.
   b. Make any necessary changes.
   c. Select **Save** to save changes.

5. ***To delete an existing stock item***:

a. Mark the checkbox for that item in the Mark column on the Stock Item Mgmt screen.
b. Select **Delete** from the Stock Items menu.

TIP: Multiple items can be deleted simultaneously by marking the checkboxes for all of the items you wish to delete before selecting Delete.

Table 21. Stock Item Detail Screen Field Descriptions

Field	Description
Stock Item Number	Enter the stock item number.
Standard Price	Enter the standard price per unit of issue.
Unit of Issue	Enter the unit of issue manually or by using the Lookup (Magnifying Glass) to search for and select the unit.
Description	Enter a description for the stock item. The counter below the field displays the maximum number of characters remaining for the description.
BOC	Enter the BOC code either manually or by using the Lookup (Magnifying Glass) to search for and select the BOC code.
Cage Code	Enter the Cage code.
National Drug Code	Enter the National Drug Code.
FSC/PSC	Enter the FSC/PSC code either manually or by using the Lookup (Magnifying Glass) to search for and select the FSC/PSC code.
Active	Mark the **Active** checkbox if you wish the stock item to become active upon creation (i.e., available to the user in lookups). Unmark this checkbox if you wish the stock item to remain inactive after it is created. When you have finished, select **Save**.

UNITS OF ISSUE

The Units of Issue option found in the Options menu within the Data Management Menu allows you to define units of issue (e.g., each, each per month, pound, etc.). The following steps describe how to manage units of issue:

1. From the Purchasing/Contracting Main menu select **System Admin** > **Data Mgmt**. This will open the Data Management Menu.
2. Select Units of Issue from the Options menu. This will open the Units of Issue Mgmt screen shown in Figure 90.

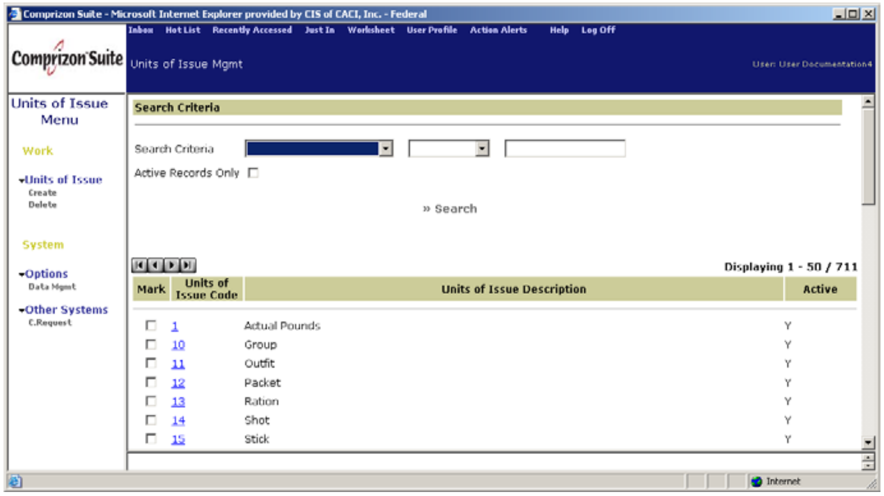


Figure 90. Units of Issue Mgmt Screen

3. ***To create a new unit of issue***:

   a. Select **Create** from the Units of Issue menu on the Units of Issue Mgmt screen. This will open the Units of Issue Detail screen shown in Figure 91.

   b. Enter the **Units of Issue Code** and, if desired, a **Description**.

   c. Mark the **Active** checkbox if you wish the unit of issue to become active upon creation (i.e., available to the user in lookups). Unmark this checkbox if you wish the unit of issue to remain inactive after it is created.

   d. Select **Save** when you have finished.

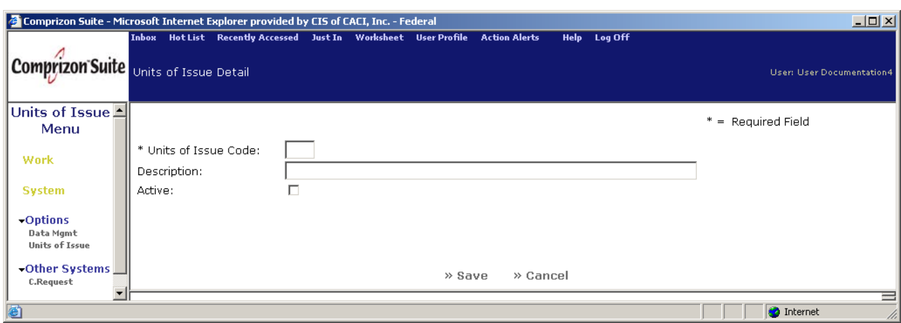


Figure 91. Units of Issue Detail Screen

4. ***To edit an existing unit of issue***:

   a. Select the unit of issue code on Units of Issue Mgmt screen. This will open the Units of Issue Detail screen for the unit you selected.

   b. Make any necessary changes.

   c. Select **Save** to save changes.

5. ***To delete an existing unit of issue***:

   a. Mark the checkbox for that unit in the Mark column on the Units of Issue Mgmt screen.

   b. Select **Delete** from the Units of Issue menu.

NOTE: The system will not allow you to delete a unit of issue that is in use in the system; instead, the system will mark the unit of issue as inactive and will no longer display it from the drop-down lists or allow users to add it to procurements.

TIP: Multiple units of issue can be deleted simultaneously by marking the checkboxes for all of the units of issue you wish to delete before selecting Delete.

WARRANTS

The following steps describe how to manage warrant levels:

1. From the Purchasing/Contracting Main menu select **System Admin** > **Data Mgmt**. This will open the Data Management Menu.
2. Select **Warrants** from the Options menu on the Data Management Menu. This will open the Warrants Mgmt screen shown in Figure 92.

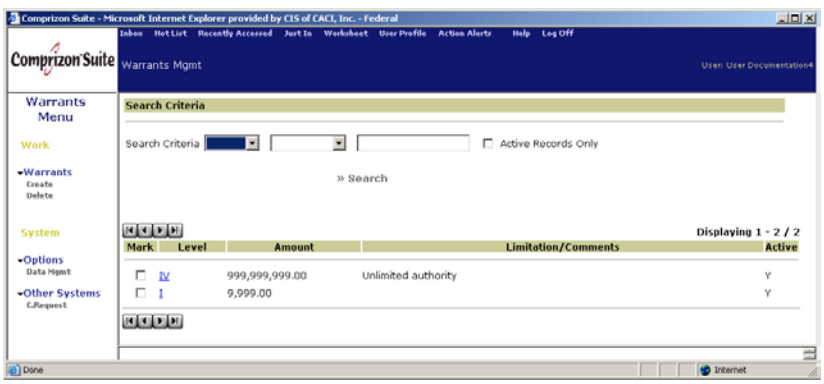


Figure 92. Warrants Mgmt Screen

3. ***To create a new warrant level***:
   a. Select **Create** from the Warrants menu on the Warrants Mgmt screen. This will open the Warrants Detail screen shown in Figure 93.
   b. Enter the **Level** name. Next enter the maximum dollar amount in the **Amount** field. If desired, you may also enter any comments in the **Limitation/Comments** field.
   c. Mark the **Active** checkbox if you wish the unit of issue to become active upon creation (i.e., available to the user in lookups). Unmark this checkbox if you wish the unit of issue to remain inactive after it is created.
   d. When you have finished, select **Save**.

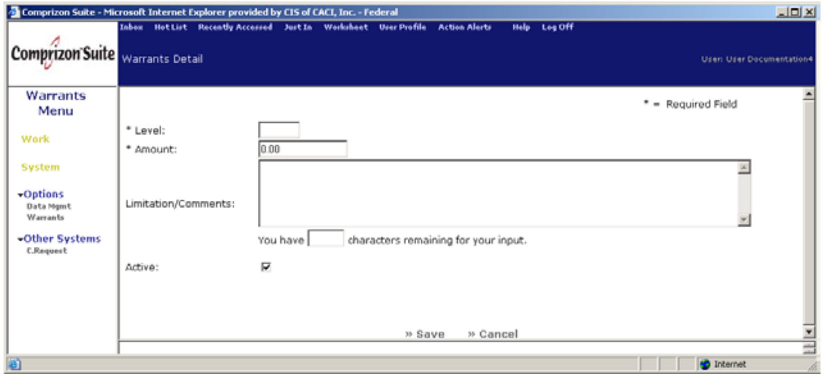


Figure 93. Warrants Detail Screen

4. ***To edit an existing warrant level***:
   a. Select the warrant level on Warrants Mgmt screen. This will open the Warrants Detail screen for the warrant level you selected.
   b. Make any necessary changes.
   c. Select **Save** to save changes.
5. ***To delete an existing warrant level***:
   a. Mark the checkbox for that warrant level in the Mark column on the Warrants Mgmt screen.
   b. Select **Delete** from the Warrants menu.

NOTE: The system will not allow you to delete a warrant level that is in use in the system; instead, the system will mark the warrant level as inactive and will no longer display it from the drop-down lists and Lookups.

TIP: Multiple units of issue can be deleted simultaneously by marking the checkboxes for all of the units of issue you wish to delete before selecting Delete.

ROUTE LIST MODELS

Many procurement offices have established review and approval systems, with clearly defined lists of reviewers. Comprizon Suite allows you to establish pre-defined route list models, which specify the reviewers and the route order. Users may import a route list model into a procurement document at any stage of the procurement process (profile, requisition, purchase request, solicitation, amendment, award, modification, deliverables, support documents). Once copied into a document, users can, if necessary, tailor the reviewer list, according to their needs and responsibilities.

The following steps describe how to manage route list models, including creating, editing, and deleting models, as well as managing reviewers on the route list:

1. From the Purchasing/Contracting Main menu select **System Admin** > **Data Mgmt**. This will open the Data Management Menu.
2. Select **Route List** from the Models menu. This will open the Route Model Management screen.

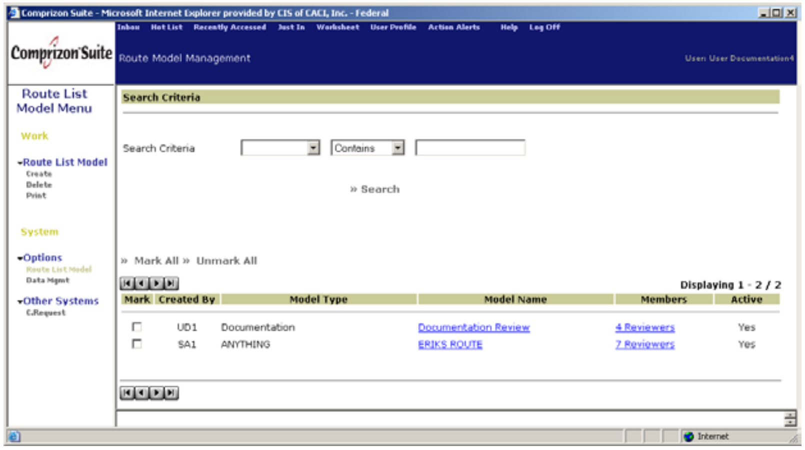


Figure 94. Route Model Management Screen

3. ***To create a route list model***:
   a. Select **Create** from the Route List Model menu on the Route Model Management screen. This opens the Route Model Detail screen shown in Figure 95.
   b. Enter the information as described in Table 22 at the end of this section.
   c. Select **Save** to save the information.

NOTE: The newly create route model will not have any reviewers. Refer to the following step for additional information for adding reviewers to and removing reviewers from a route model.

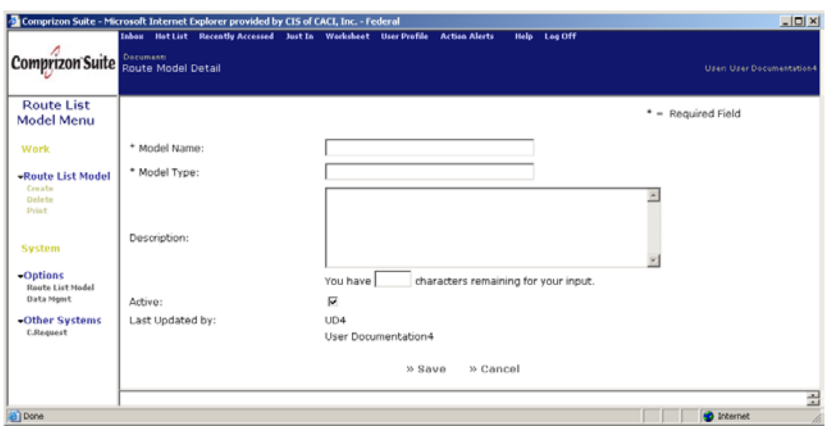


Figure 95. Route Model Detail Screen

4. ***To manage reviewers***:

   The number of reviewers in a route model will be displayed as a link in the Members column on the Route Model Management screen. Selecting this link will open the Route Model Reviewer Management screen shown in Figure 96. This screen lists users who are already members of the team. The following steps describe how to add and remove users on this list.

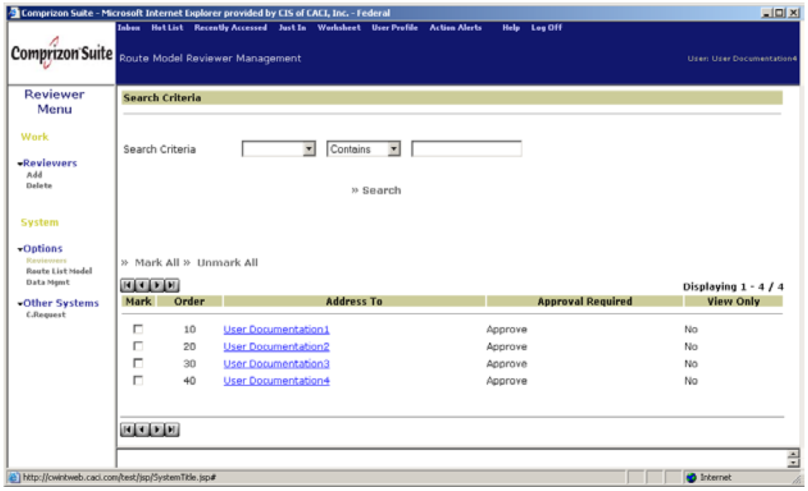


Figure 96. Route Model Reviewer Management Screen

a. ***Add Reviewers to a Route Model***:

Select **Add** from the Reviewers menu on the Route Model Reviewer Management screen. This will open the Route Model Reviewer Detail screen shown in Figure 97. Enter the information as described in Table 23 at the end of this section, and then select **Save**.

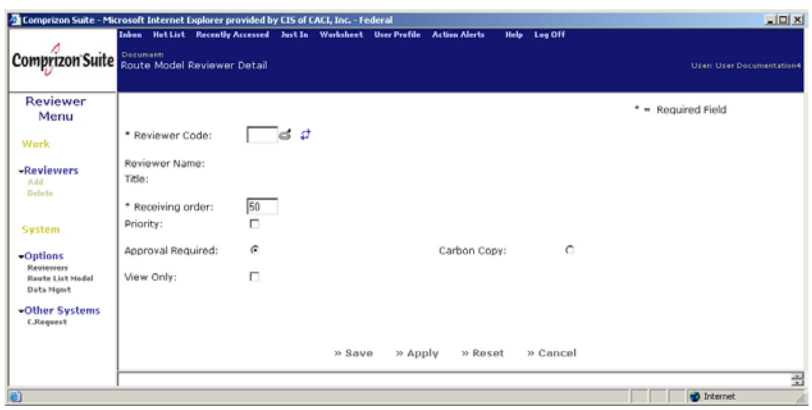


Figure 97. Route Model Reviewer Detail Screen

b. ***Remove Reviewers from a Route Model:***

To remove a user from the team, mark that user's checkbox in the Mark column on the Team Members Management screen, and then select **Remove** from the Actions menu.

TIP: Multiple entries can be removed simultaneously by marking the checkboxes for all of the entries you wish to remove before selecting Remove.

5. ***To edit an existing route list model***:

a. Select the link for that model in the Model Name column on the Route Model Management screen. This will open the Route Model Detail screen.

b. Make any necessary changes.

c. Select **Save** to save changes.

6. ***To delete an existing route list model***:
   a. Mark the checkbox for that model on the Route Model Management screen.
   b. Select **Delete** from the Route List Model menu.

TIP: Multiple entries can be removed simultaneously by marking the checkboxes for all of the entries you wish to remove before selecting Remove.

Table 22. Route Model Detail Screen Field Descriptions

Field	Description
Model Name	Enter the name for the route model.
Model Type	Enter the type of route model (e.g., Requisition, Award, etc.)
Description	If desired, enter a description for the route model. The counter below this field displays the number of characters remaining for the description.
Active	Mark this checkbox to indicate that the route model should become active upon creation; remove the checkmark for the model to remain inactive after creation. An active model will be shown to in lookups when users are importing route models into their documents.
Last Updated by	This field displays the user code and name of the user who last made changes to this model.

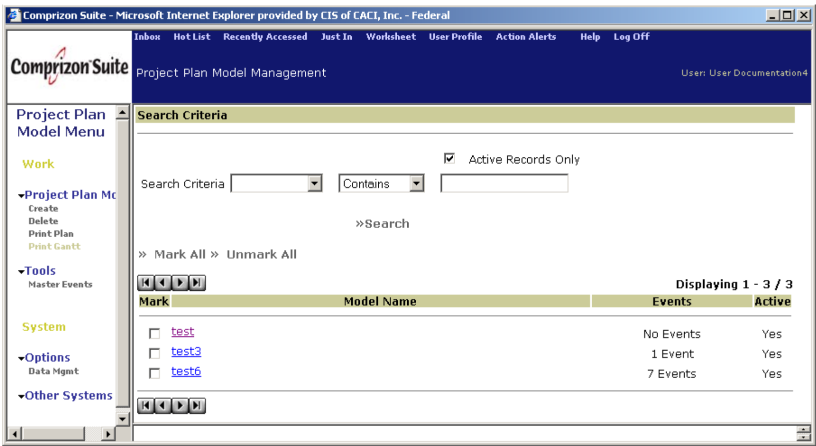
Table 23. Route Model Reviewer Detail Screen Field Descriptions

Field	Description
Reviewer Code	Enter the user code for the reviewer you wish to add, or use the Lookup (Magnifying Glass) to search for and select the reviewer.
Reviewer Name	Displays the name of the reviewer whose code you entered in the Reviewer Code field.
Title	Displays the title of the reviewer whose code you entered in the Reviewer Code field.
Receiving Order	The system defaults reviewer order numbers in increments of ten. Other names can be inserted later, if necessary, and can be numbered individually. (Example: The first person is assigned “10”, the second person is assigned “20”, but you can insert a reviewer between these two by numbering the reviewer's receiving order as "11," etc.)
Priority	Mark this checkbox to indicate that the review is a priority for the reviewer.
Approval Required	Selecting this radio button indicates that the reviewer’s approval is necessary for the action to progress in the routing process.
Carbon Copy	Selecting this radio button option allows the reviewer to review the routed action, but not to make any changes to the action. The reviewer will be able to approve or disapprove the routed action. When Carbon Copy is chosen, you will receive the record as view only. Upon review of the record, you are acknowledging that you have reviewed the record; if you do not immediately review the record, you will not hold up the routing process. For a user to be a carbon copy, there has to be a full access reviewer in the same order (i.e., if the carbon copy reviewer has a route order of 10, there has to be a full access reviewer with a route order of 10 as well.
View Only	Selecting this radio button option allows the reviewer to review the routed action, but not make any changes to the action. If the reviewer has full access, they continue to have the ability to approve or disapprove the record, but they are unable to update the document. View Only reviewers, will hold up a route list until they approve or disapprove the record.

PROJECT PLAN MODELS

The Project Plan Models feature allows you to create standard project plan models that can then be imported by users who are creating project plans in the C.Award and C.Request modules. Users may edit models as necessary once they have imported them. The following steps describe how to create, edit, and delete project plans, as well as how to manage plan events.

1. From the Purchasing/Contracting Main menu select **System Admin** > **Data Mgmt**. This will open the Data Management Menu.
2. Select **Project Plans** from the Models menu. This will open the Project Plan Model Management screen.



3. ***To create a project plan model***:
   a. Select **Create** from the Project Plan Model menu. This will open the Project Plan Model Detail screen.
   b. Enter the information as described in Table 24 at the end of this section.
   c. Select **Save** when you have finished.

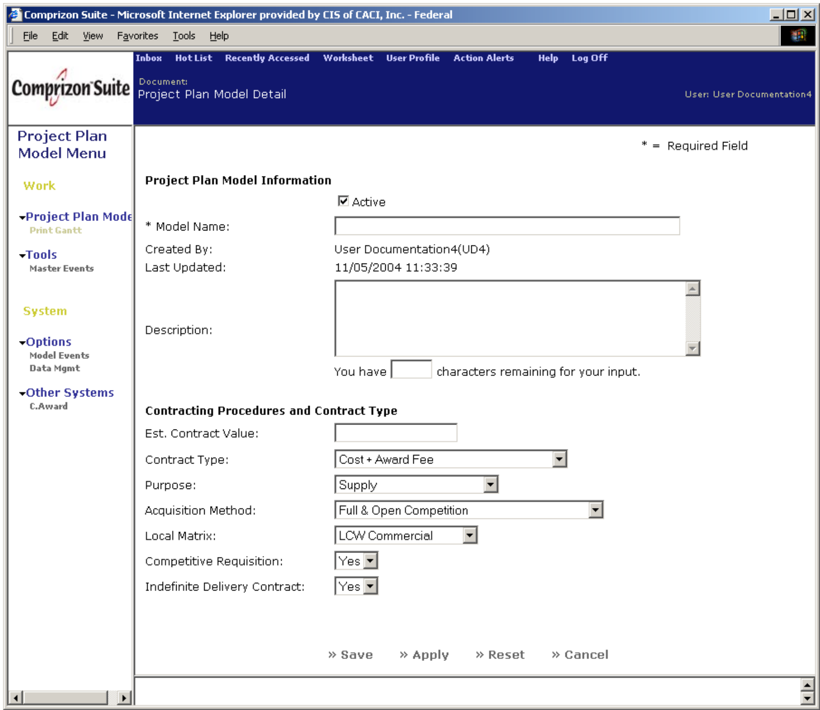


Figure 98. Project Plan Model Detail

4. ***To edit an existing project plan model***:

   a. Open the project plan model by selecting its link in the Model Name column on the Project Plan Model Management screen.

   b. Make any necessary changes.

   c. Select **Save** to save changes.

5. ***To delete an existing project plan model:***

   a. Mark the checkbox for that plan in the Mark column on the Project Plan Model Management screen.

   b. Select **Delete** from the Project Plan Model menu.

6. ***To manage project plan model events:***

   After you have created the project plan, you may add and manage events.

   a. If the model is not already open, select the link for that model in the Model Name column on the Project Plan Model Management screen.

   b. Select **Model Events** from the Options menu. This will open the Project Plan Model Event Management screen shown in Figure 99.

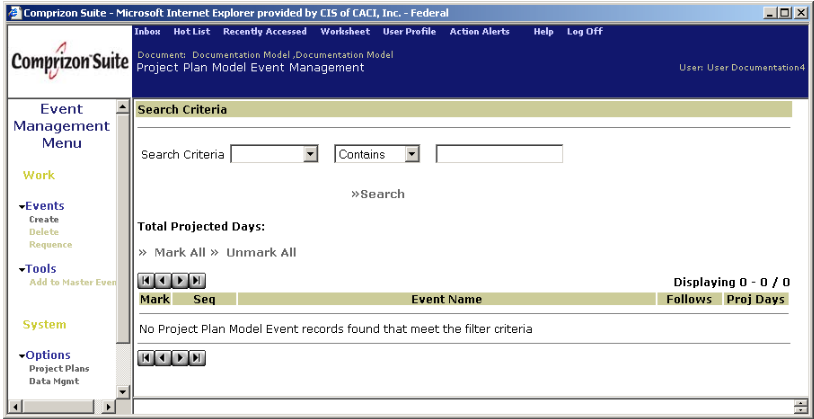


Figure 99. Project Plan Model Event Management Screen

c. ***To create an event:***

Select **Create** from the Events menu. This will open the Project Plan Model Event Detail screen shown in Figure 100. Enter the information as described in Table 25 at the end of this section, and then select **Save**.

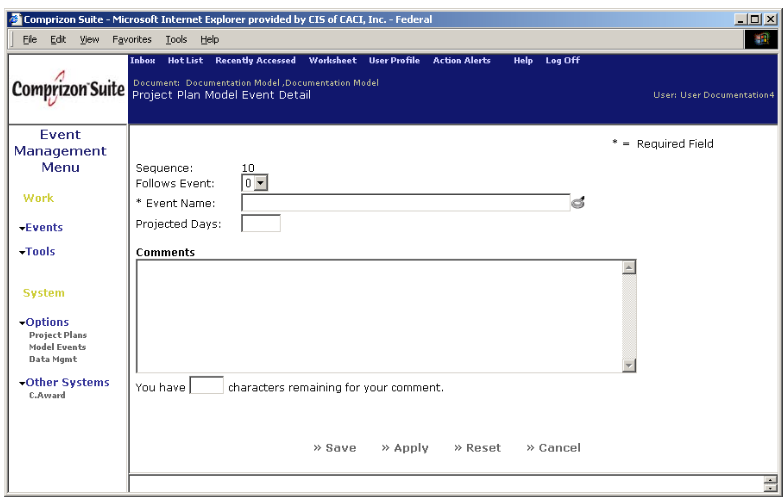


Figure 100. Project Plan Model Event Detail Screen

d. ***To delete an event:***

Mark the checkbox for that event, and then select **Delete** from the Actions menu.

e. ***To edit an existing event:***

Open the event by selecting its link in the Event Name column. Make any necessary changes, and then select **Save**.

f. ***To resequence events:***

Resequencing events changes the sequence number on all existing events so that they are once again numbered in increments of ten. To resequence events, mark the checkbox for the entry (or entries) you wish to resequence. Select **Resequence** from the Actions menu.

Table 24. Project Plan Model Detail Screen Field Descriptions

Field	Description
Active	Mark this checkbox if you wish the model to become active upon creation (i.e., available to the user for import). Unmark this checkbox if you wish the model to remain inactive after it is created.
Model Name	Enter a name for the project plan model.
Created By	Displays the name of the user who created the model.
Last Updated	Displays the date and time the model was last updated.
Description	Enter a description for the model. The counter below this field indicates the maximum number of remaining characters.
Est. Contract Value	Enter the estimated Contract Value.
Contract Type	Select the Contract Type from the drop-down list provided.
Purpose	Select the Purpose from the drop-down list provided.
Acquisition Method	Select the Acquisition Method from the drop-down list provided.
Local Matrix	Select the Local Matrix from the drop-down list provided.
Competitive Requisition	Select "Yes" or "No" from the drop-down list provided.
Indefinite Delivery Contract	Select "Yes" or "No" from the drop-down list provided.

Table 25. Project Plan Model Event Detail Screen Field Descriptions

Field	Description
Sequence	Displays the sequence number of the event.
Follows Event	Select the sequence number of the event that this event should follow from the drop-down list provided.
Event Title	Enter the event title manually or by using the Lookup (Magnifying Glass) to search for and select the Event.
Projected Days	Enter the number of days that the project will take.
Comments	Enter any comments. The counter below this field indicates the maximum number of remaining characters.

CURRENCY CODES

If system parameters have been set to allow the use of foreign currency, the Currency Codes option found in the OCONUS menu within the Data Management Menu allows you to input currency codes. The following steps describe how to manage currency codes:

1. From the Purchasing/Contracting Main menu select **System Admin** > **Data Mgmt**. This will open the Data Management Menu.
2. Select **Currency Codes** from the OCONUS menu. This will open the Currency Code Management screen shown in Figure 101.

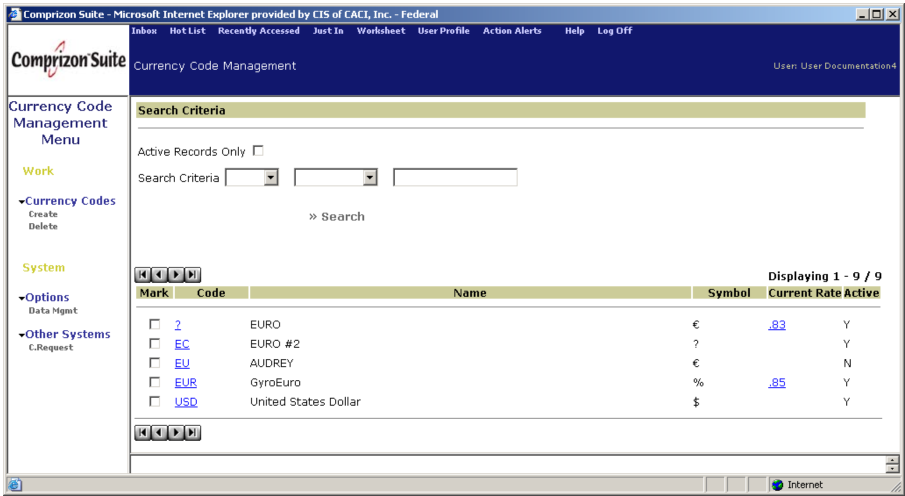


Figure 101. Currency Code Management Screen

3. ***To create a new currency code***:

   a. Select **Create** from the Currency Codes Menu on the Currency Code Management screen. This will open the Currency Detail screen shown in Figure 102.

   b. Enter the information as described in Table 26 at the end of this section.

   c. Select **Save**.

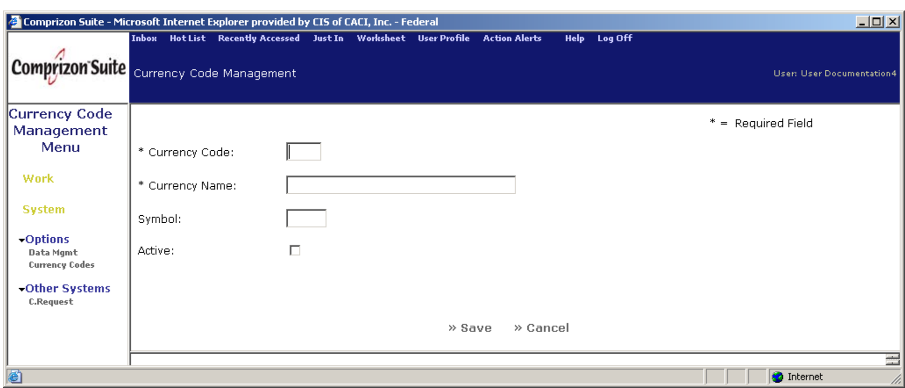


Figure 102. Currency Code Detail Screen

4. ***To edit an existing code:***

   a. Select the currency code in the Code column on the Currency Code Management screen. This will open the Currency Detail screen for the code you selected.

   b. Make any necessary changes.

   c. Select **Save** to save changes.

5. ***To delete an existing code:***
   a. Mark the checkbox for that code in the Mark column on the Currency Code Management screen.
   b. Select **Delete** from the Currency Codes menu.

NOTE: You will not be allowed to delete the USD currency code. Also, the system will not allow you to delete a currency code that is in use in the system; instead, the system will mark the currency code as inactive. Inactive currency codes will not be displayed in drop-down menus and users will not be able to add the inactive currency code to a procurement.

TIP: Multiple codes can be deleted simultaneously by marking the checkboxes for all of the codes you wish to delete before selecting Delete.

Table 26. Currency Detail Screen Field Descriptions

Field	Description
Currency Code	Enter the currency code.
Currency Name	Enter the currency name.
Symbol	Enter the symbol for the currency.
Active	Mark this checkbox if you wish for the currency code to become active immediately upon creation.

CURRENCY RATES

The Currency Rate Management screen allows you to set the ratio between the US Dollar and currencies you have already created. The following steps describe how to add and delete currency rates:

1. From the Purchasing/Contracting Main menu select **System Admin** > **Data Mgmt**. This will open the Data Management Menu.
2. Select **Currency Rate** from the OCONUS menu within the Data Management Menu. This will open the Currency Rate Management screen shown in Figure 103.

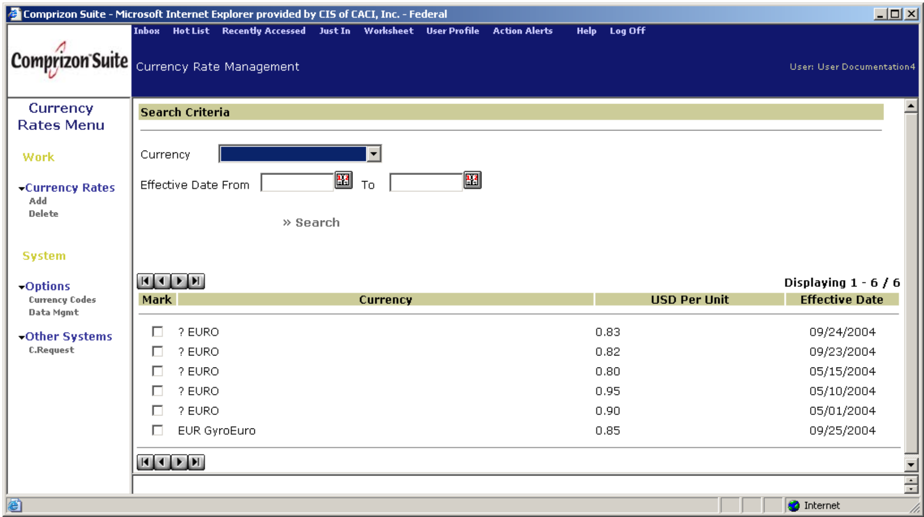


Figure 103. Currency Rate Management Screen

3. ***To add a new currency rate***:

   a. Select **Add** from the Currency Rates Menu on the Currency Code Management screen. This will open the Currency Detail screen shown in Figure 104. You can add multiple rates for a currency, each with its own Effective Date.

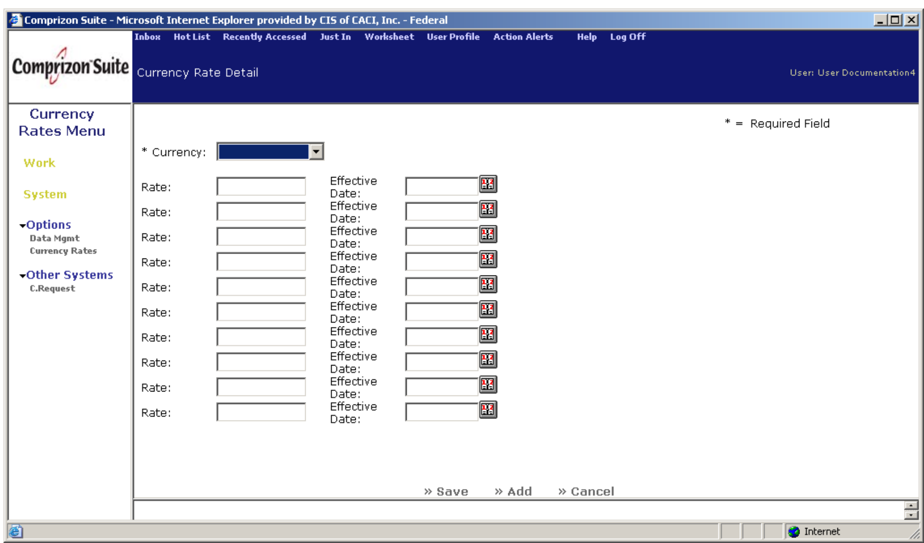


Figure 104. Currency Code Detail Screen

   b. Select the correct currency from the drop-down list provided in the **Currency** field..

   c. Next enter each rate you wish to add in a separate box, and set an **Effective Date** for each rate either by manually entering the date in the MM/DD/YYYY format or by using the Calendar to search for and select a date.

   d. Select **Save** when you have finished entering rates.

4. ***To delete an existing rate***:

   a. Mark the checkbox for that rate in the Mark column on the Currency Rate Management screen

   b. Select **Delete** from the Currency Rates Menu.

TIP:	Multiple rates can be deleted simultaneously by marking the checkboxes for all of the rates you wish to delete before selecting Delete.

Chapter 5

ACQUISITION REGULATIONS

IN THIS SECTION…

ACQUISITION REGULATIONS OVERVIEW

Acquisition Regulations give the user online access to relevant and up-to-date terms, conditions and clauses, and local provisions and clauses. Local matrices are created and maintained, and sites may predefine clauses based on the procurement type and amount. System Administrators may load updates to the FAR, and sites may define their own local clauses to meet site-specific needs not covered by the clauses available at the site.

CLAUSE MANAGEMENT

The following steps describe how to manage individual clauses.

NOTE: Information on maintaining local matrices and updating acquisition regulations can be found later in this chapter.

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1. From the Purchasing/Contracting Main menu select **System Admin** > **Acq Reg Mgmt**. This will open the Acquisition Regulations Management screen shown in Figure 105.

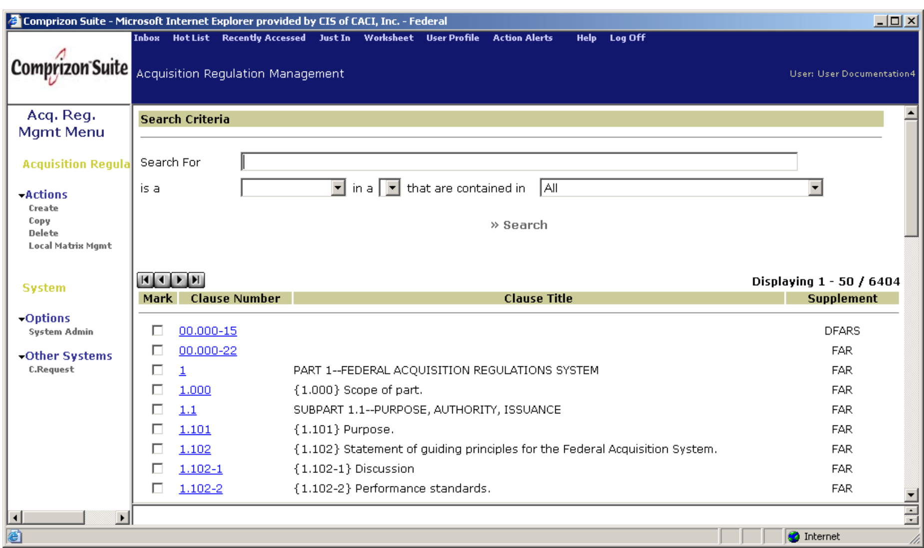

Figure 105. Acquisition Regulation Management Screen

2. ***To create a clause***:

   a. Select **Create** from the Actions menu on the Acquisition Regulation Management screen. This will open the System Admin Clause Detail screen. This screen consists of the following four tabs: Detail (Figure 106), Text (Figure 107), Instructions (Figure 108), and Prescription.

   b. Enter the information in the fields on the Detail, Text, and Instructions tabs as described in Table 27 at the end of this section.

   c. Select **Save** to save the information.

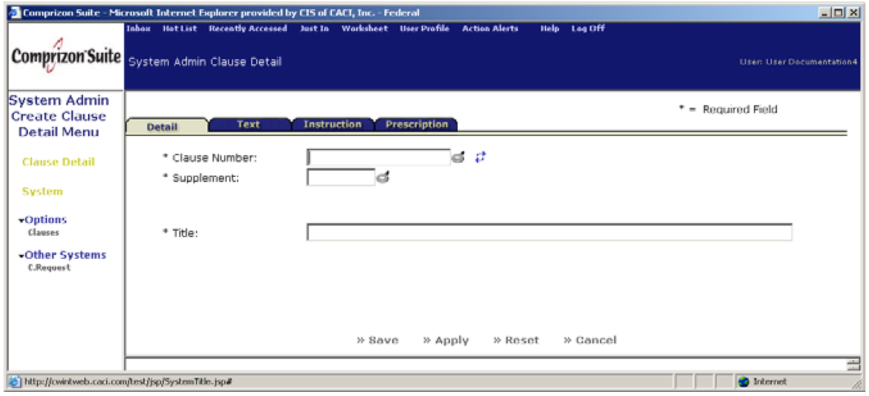

Figure 106. System Admin Clause Detail Screen – Detail Tab

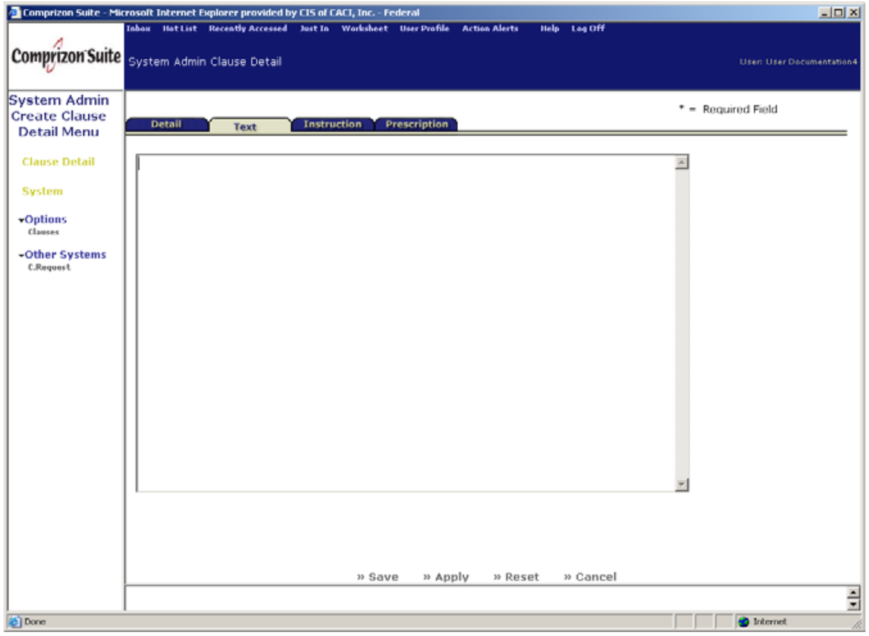

Figure 107. System Admin Clause Detail Screen – Text Tab

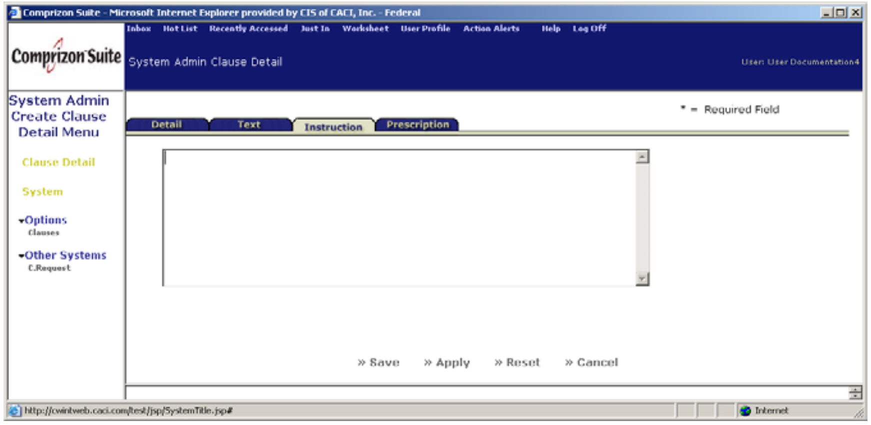

Figure 108. System Admin Clause Detail Screen – Instruction Tab

3. ***To copy an existing clause***:
   a. Mark the checkbox for that clause in the Mark column on the Acquisition Regulation Management screen.
   b. Select **Copy** from the Actions menu.
   c. Make any necessary changes on the System Admin Clause Detail screen
   d. Select **Save**.

4. ***To delete an existing clause***
   a. Mark the checkbox beside that clause in the Mark column on the Acquisition Regulation Management screen.
   b. Select **Delete** from the Actions menu.

NOTE: You will not be allowed to delete a clause that is currently being used in the system.

TIP: Multiple clauses can be deleted simultaneously by marking the checkboxes for all of the clauses you wish to delete before selecting Delete.

Table 27. System Admin Clause Detail Screen Field Descriptions

Field	Description
Detail Tab	
Clause Number	Enter a clause number, or use the Lookup (Magnifying Glass) to search for and select a clause. Selecting a clause from the Lookup will populate the appropriate fields on all of the tabs on the System Admin Clause Detail screen.
Supplement	Enter a supplement, or use the Lookup (Magnifying Glass) to search for and select a supplement.
Title	Enter the title for the clause.
Text Tab	
Enter the text for the clause or, if the text was populated when you selected a clause from the Lookup, make any necessary changes. You may divide the text into paragraphs and create fill-using the following tags (tags are shown in bold text with sample text between the tags): ▪ To divide text into paragraph: Enter paragraph text. ▪ To create a fill-in: **<q>Enter any and all information to help the user complete the fill-in.</q>	
Instructions Tab	
Enter the text for any instructions or, if the text was populated when you selected a clause from the Lookup, make any necessary changes.	

LOCAL MATRIX MANAGEMENT

A clause matrix is a grouping of related clauses. The following steps describe how to manage local matrices, including creating, editing, and deleting matrices, as well as managing the clauses included in the matrix.

1. From the Purchasing/Contracting Main menu select **System Admin** > **Acq Reg Mgmt**. This will open the Acquisition Regulations Management screen shown in Figure 105.
2. Select **Local Clause Mgmt** from the Actions menu. This will open the Local Matrix Management screen shown in Figure 109.
   .

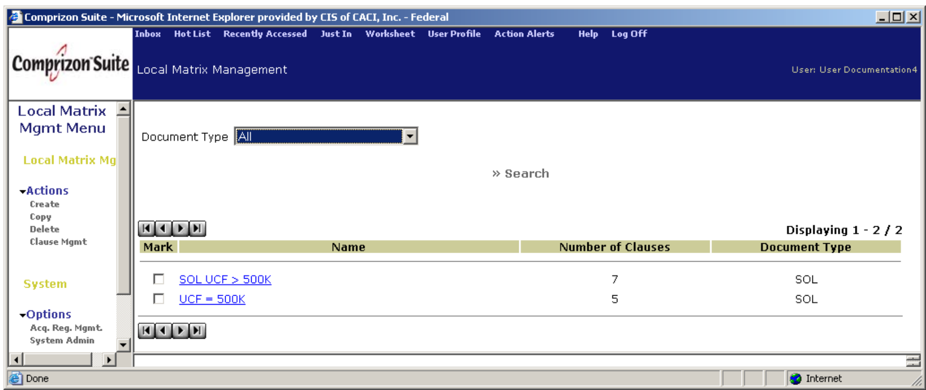

Figure 109. Local Matrix Management Screen

3. ***To create a new clause matrix***:
   a. Select **Create** from the Actions menu on the Local Matrix Management screen. This will open the Local Matrix Detail screen shown in Figure 110.
   b. Select the **Document Type** from the drop-down list.
   c. Enter the **Name** for the matrix.
   d. Select **Save**.

NOTE: When the matrix is created, it does not contain any clauses. Refer to the *Manage Clauses Within a Matrix* section for additional information on adding clauses to a matrix.

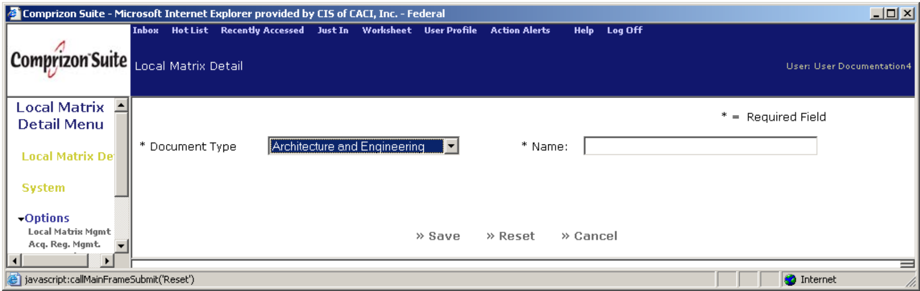

Figure 110. Local Matrix Detail Screen

4. ***To copy an existing matrix***:
   a. Mark the checkbox for that matrix in the Mark column.
   b. Select **Copy** from the Actions menu.
   c. Make any necessary changes on the Local Matrix Detail screen.
   d. Select **Save**. All of the clauses in the matrix you copied will be copied into the new matrix.

5. ***To delete an existing matrix***:
   a. Mark the checkbox beside that matrix in the Mark column on the Local Clause Management screen.
   b. Select **Delete** from the Actions menu.

NOTE: You will not be allowed to delete a matrix that is currently being used in the system.

TIP: Multiple matrices can be deleted simultaneously by marking the checkboxes for all of the clauses you wish to delete before selecting Delete.

---

6. ***To manage clauses within a matrix***:

   Clause management allows you to add existing clauses, create new clauses, and delete existing clauses for a matrix.

   a. Mark the checkbox for that matrix in the Mark column on the Local Matrix Management screen.
   b. Select **Clause Mgmt** from the Actions menu. This will open the Local Matrix Clause Management screen shown in Figure 111, which lists all of the clauses currently in the matrix.

Figure 111. Local Matrix Clause Management Screen

c. ***To add existing clauses or create new clauses***:

Select **Create** from the Actions menu. Refer to the *Clause Management* section within this chapter for detailed instructions for creating a new clause.

d. ***To delete a clause from the matrix***:

Mark the checkbox for that clause in the Mark column on the Local Matrix Clause Management screen, and then select **Delete** from the Actions menu.

Updating Acquisition Regulations

At initial configuration, a site is provided with acquisition regulations files, including both the FAR and agency-specific regulations (e.g., GSAM, DFAR). In addition, updates are provided as necessary.

Updates will consist of the following two files:

- FAR_UPDATE.456
  - FAR - Indicates the suppliment being supplies
  - UPDATE - Indicates this is an update, if this were a full load, UPDATE would be replaced with FULL
  - 456 - Indicates which update the file relates to -
- FAR_MX.456
  - FAR - Indicates the suppliment being supplies
  - MX - Indicates this is a Matrix file, a pre-grouped set of clauses
  - 456 - Indicates which update the file relates to

The following steps describe how to update acquisition regulations:

1. To upload the update, select **Upload ACQ File** from the Tools menu on the System Administration Menu.
2. Browse to the file location.
3. Select **Upload**.
4. Once both files are uploaded, select **Update ACQ Reg** from the Tools menu on the System Administration Menu. The system will show the current Acquisition Regulations in the system, as well as the most current update. To update to a specific update, the system must have the previous update. For example, if you just uploaded update 456, the site must currently have update 455. If not the system will not display an available update.
5. Mark the update and then select **Apply** to initiate the update. The Update file contains three types of actions: New, Change, and Delete. Clauses already assigned to documents are not affected by changes and deletions.
   - If the clause is flagged as *New*, the system adds the clause to the system
   - If the clause is flagged as *Change*, the system updates the existing clause
   - If the clause is flagged as *Delete*, the system removes the existing clause
6. Once the system completes the process, the screen refreshes, and if there is another update to be completed, the process will begin again.

Chapter 6

USER PROFILE MANAGEMENT

IN THIS SECTION…

USER PROFILE MANAGEMENT OVERVIEW

User profile management allows you to create a new account for a user. You may also edit an existing account, delete users from the system, and manage user profile information. In addition, ComprizonSuite allows you to set up personal account codes, teams, and P-Card approval lists for users.

MANAGE USER ACCOUNTS

The following steps describe how to create, edit, and delete user account profile information:

1. From the Purchasing/Contracting Main menu select **System Admin** > **User Profiles**. This will open the User Profile List screen shown in Figure 112.

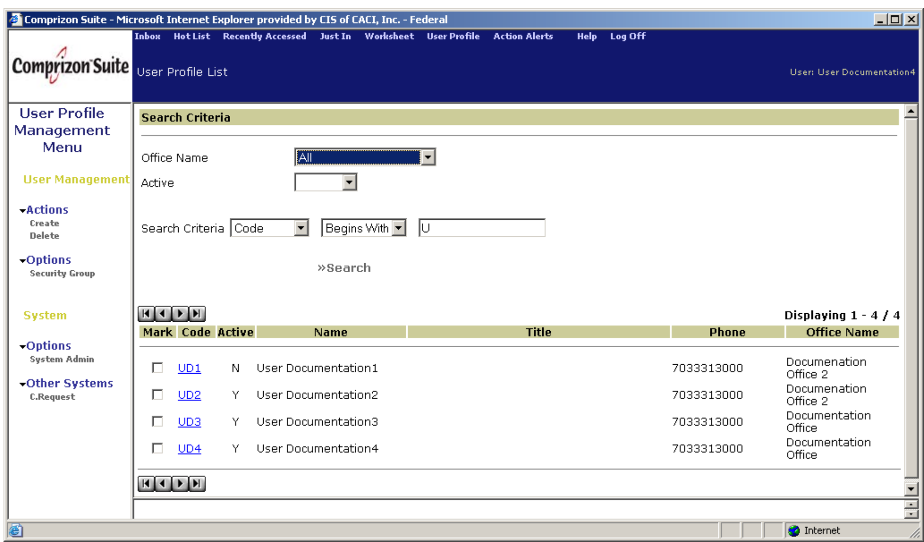

Figure 112. User Profile List Screen

2. ***To create a new user***:

   a. Select **Create** from the Actions menu. The User Profile Administration screen displays. This screen consists of the following five tabs: Administration (Figure 113), Addresses (Figure 114), Authority (Figure 115), Certification (Figure 116),and Warrants (Figure 117).

   b. Enter the information as described in Table 28 at the end of this section.

   c. Select **Save** to save the information.

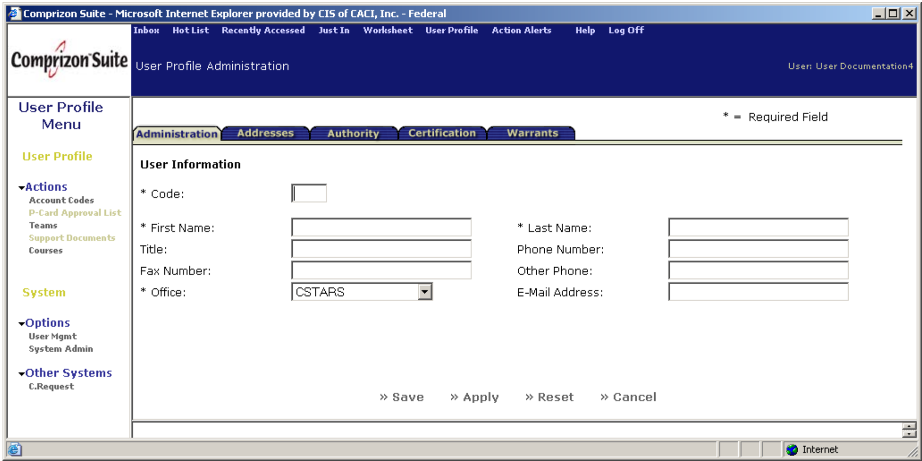

Figure 113. User Profile Administration Screen – Administration Tab

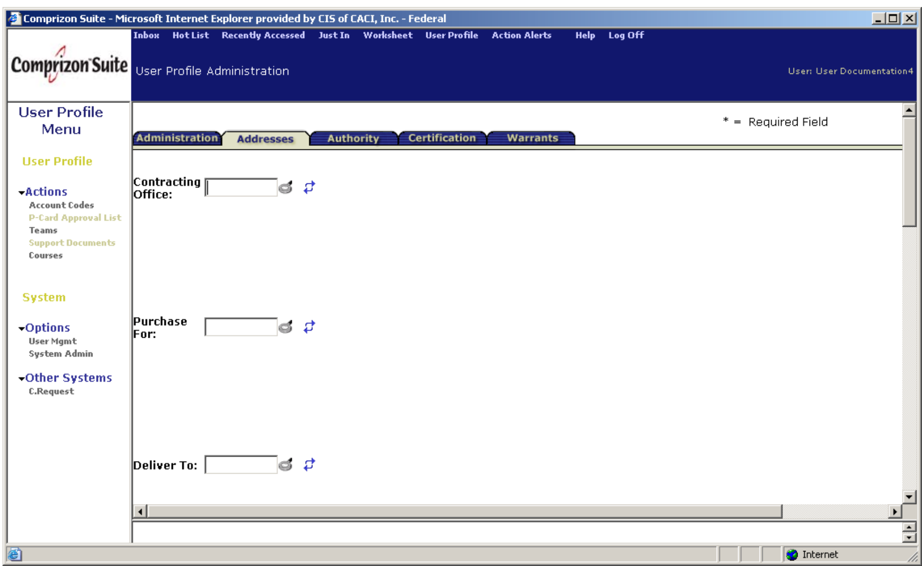

Figure 114. User Profile Administration Screen – Addresses Tab

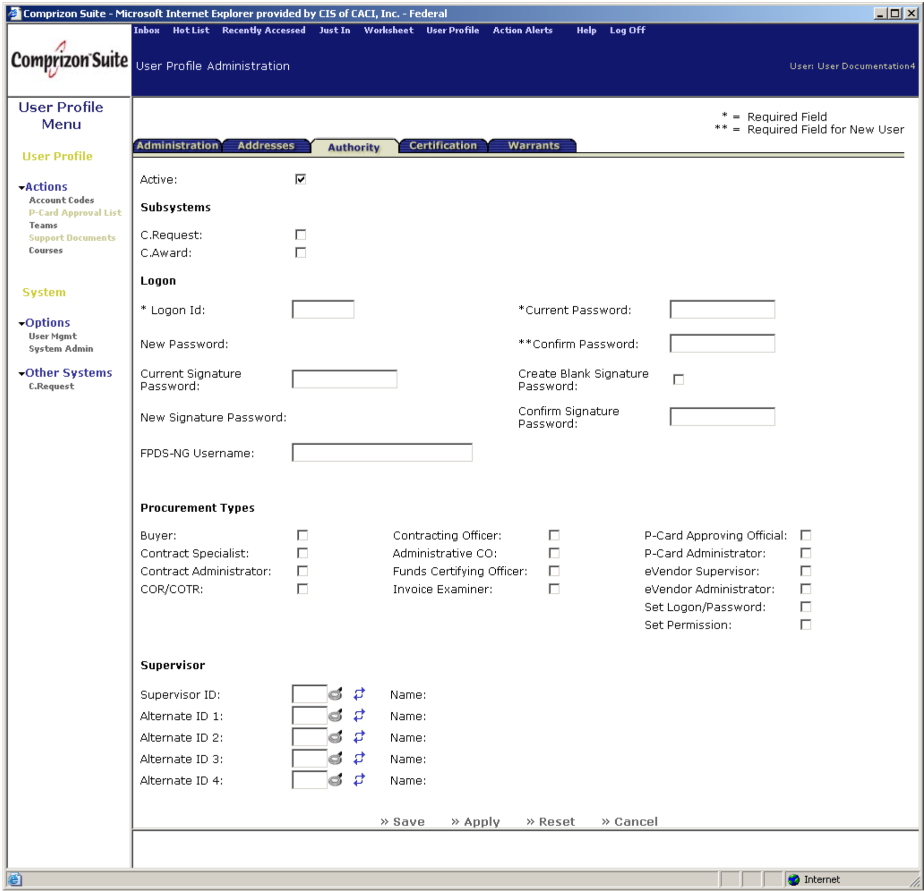

Figure 115. User Profile Administration Screen – Authority Tab

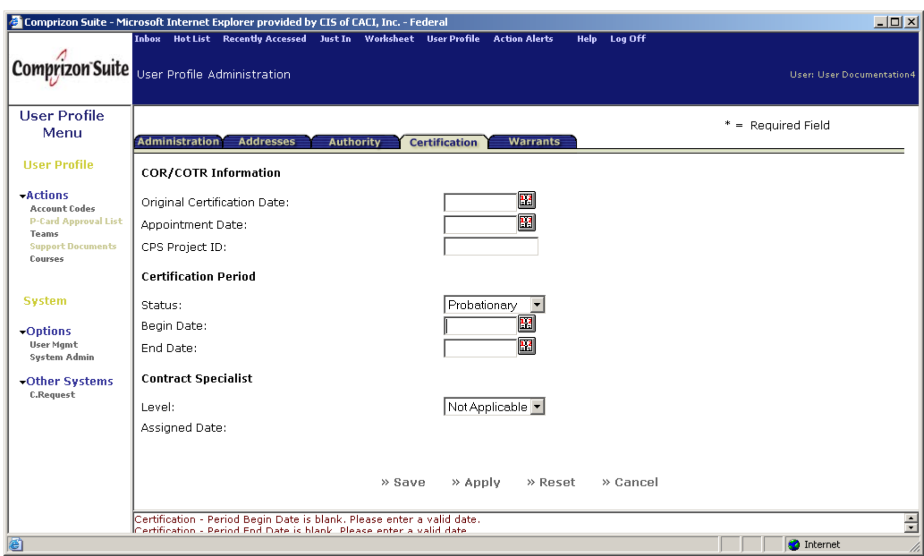

Figure 116. User Profile Administration Screen – Certification Tab

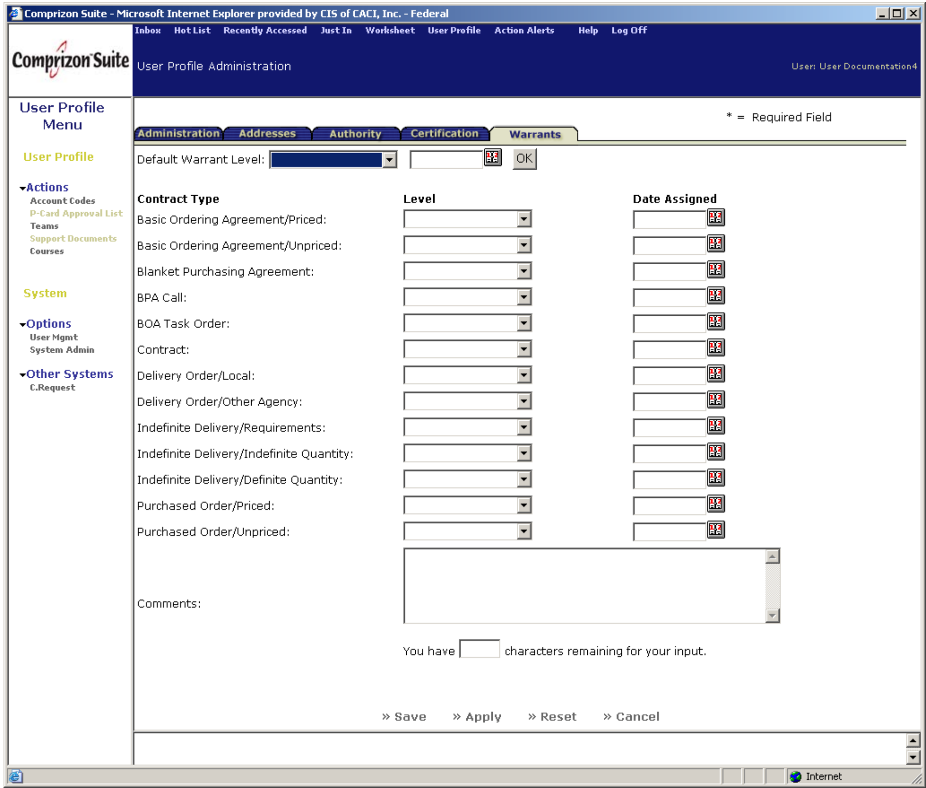

Figure 117. User Profile Administration Screen – Warrants Tab

3. ***To edit an existing user***:
   a. Select the link for the user in the Code column on the User Profile List screen.
   b. Make any necessary changes. This will open the User Profile Administration screen.
   c. Make any necessary changes.
   d. Select Save to save the changes.

4. ***To delete an existing user***:
   a. Mark the checkbox for that user in the Mark column on the User Profile List screen.
   b. Select **Delete** from the Actions menu.

Table 28. User Profile Administration Screen Field Descriptions

Field	Description
Administration Tab **NOTE:** With the exception of the Code, the user may use the My Profile option in any of the Comprizon Suite modules to edit this information.	
Code	Enter a unique three-character user code for the user. Once a code is entered, it may not be edited by either the System Administrator or by the user.
First Name	Enter the user's first name.

Last Name	Enter the user's last name.
Title	Enter the user's title.
Phone Number	Enter the user's phone number.
Fax Number	Enter the user's fax number.
Other Number	Enter another phone number.
Office	Select the office from the drop-down list provided.
E-mail Address	Enter the e-mail address for the user.
Addresses Tab **NOTE: T**he user may use the My Profile option in any of the Comprizon Suite modules to edit this information.	
Contracting Office	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address. Note that any information entered in this field will take precedence over site and office addresses when the user account is created.
Purchase For	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address. Note that any information entered in this field will take precedence over site and office addresses when the user account is created.
Deliver To	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address. Note that any information entered in this field will take precedence over site and office addresses when the user account is created.
Ultimate Destination	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address. Note that any information entered in this field will take precedence over site and office addresses when the user account is created.
Issued By	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address. Note that any information entered in this field will take precedence over site and office addresses when the user account is created.
Offer Due	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address. Note that any information entered in this field will take precedence over site and office addresses when the user account is created.
Admin By	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address. Note that any information entered in this field will take precedence over site and office addresses when the user account is created.
Invoice To	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address. Note that any information entered in this field will take precedence over site and office addresses when the user account is created.
Payment Office	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address. Note that any information entered in this field will take precedence over site and office addresses when the user account is created.
Authority Tab	
Active	Mark this checkbox to indicate that the user account will be active upon creation. Unmark the checkbox if you wish for the account to remain inactive after creation. Inactive users do not display in lookups and cannot login to the system.
Subsystems section	Mark the checkboxes for all modules that the user will have permission to access.
Procurement Types section	Mark the checkboxes for all roles that the user will have in the system. This field prevents users from receiving submitted documents or being assigned as the CO/COTR on awards if they have not been assigned that role.
Supervisor section	Enter the user codes, or use the Lookup (Magnifying Glass) to search for and select the user codes, for the user's Supervisor and for alternates that have the authority to review or approve actions when the user is unavailable. Supervisors are allowed to assign, unassign,

	and reassign the user's workload.
Logon ID	Enter the Login ID that the user will use to login to the system. The user may edit this field.
Current Password	Enter the password that the user currently uses to login to the system.
New Password	If applicable, enter a new login password in this field. Users may assign their own passwords.
Confirm Password	If you have entered a new password, re-enter that new password here.
Current Signature Password	The user's current signature password displays in this field.
Create Blank Signature Password	If you wish the new signature password to be blank, the mark the checkbox in this field. Users may assign their own passwords.
New Signature Password	To create a new signature password, enter the new password in this field. Users may assign their own passwords.
Confirm Signature Password	If you have entered a new signature password, then re-enter the new password here.
Procurement Types section	Mark the checkbox for all procurement types that are should be available to the user.
Certification Tab	
Level	Select the appropriate certification level from the drop-down list provided.
Date Assigned	After you have selected the certification level, enter the date the level was assigned either manually in the MM/DD/YYYY format, or use the Calendar to search for and select a date.
Warrants Tab	
Default Warrant Level	Select the warrant level from the drop-down list provided, and then enter a date that the warrant level becomes effective (MM/DD/YYYY format), or use the Calendar to search for and select the date.
Contract Type column	This column displays the different types of contracts for which the user is authorized to be the Contract Officer.
Level column	Select the warrant level for the corresponding contract type from the drop-down list.
Date Assigned column	Enter the date that the warrant level for the corresponding contract type becomes effective (MM/DD/YYYY format), or use the Calendar to search for and select a date.
Comments	Enter any comments. A counter below the field indicates the number of characters you have remaining for your comment.

MANAGE PERSONAL ACCOUNT CODES

Personal account codes are account codes maintained by individual users to facilitate easy entry of accounting information. System Administrators can assign default personal account codes for users, and the users may them create, edit, or delete them as necessary. For information on how users maintain their personal account codes, refer to the *Comprizon Suite User Manual*. The following steps describe how to create, edit, and delet personal account codes in the system administration module:

1. From the Purchasing/Contracting Main menu select **System Admin** > **User Profiles**. This will open the User Profile List screen shown in Figure 112.

2. Select the link for the user in the Code column on the User Profile List screen.

3. Select **Account Codes** from the Actions menu. The Personal Account Code Management screen shown in Figure 118 displays.

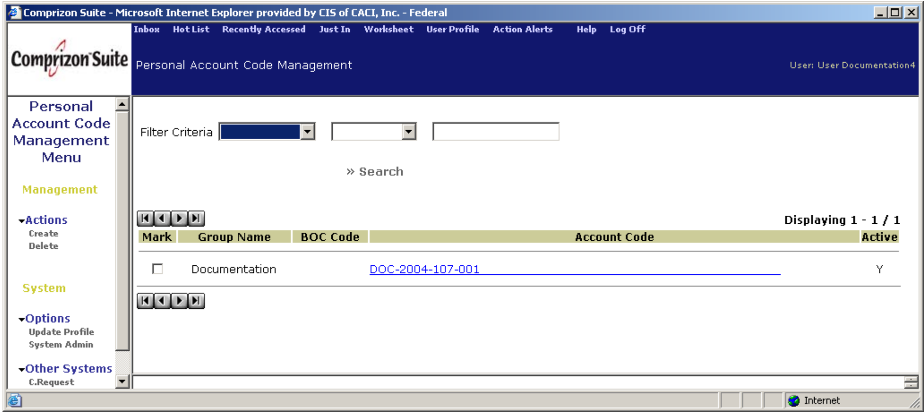

Figure 118. Personal Account Codes Screen

4. ***To create a new personal account code***:

   a. Select **Create** from the Actions menu. The Personal Account Code Detail screen shown in Figure 119 displays.

   b. Enter the information as described in Table 29 at the end of this section.

   c. Select **Save**.

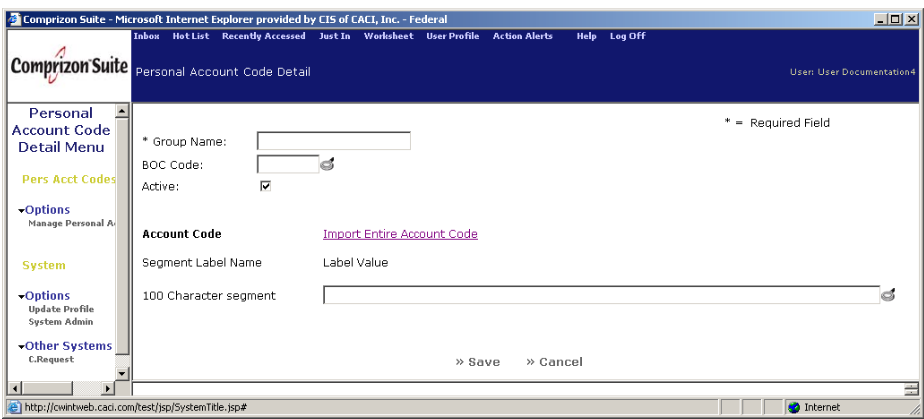

Figure 119. Personal Account Code Detail Screen

5. ***To edit an existing account code:***

   a. Select that code's link on the Personal Account Code Management screen. This will open the Personal Account Code Detail screen.

   b. Make any necessary changes.

   c. Select **Save**.

6. ***To delete an existing personal account code:***
   a. Mark that code's checkbox in the Mark column on the Personal Account Code Management screen.
   b. Select **Delete** from the Actions menu.

TIP: Multiple entries can be deleted simultaneously by marking the checkboxes for all of the entries you wish to delete before selecting Delete.

Table 29. Personal Account Code Detail Screen Field Descriptions

Field	Description
Group Name	Enter the group name. The group name allows users to filter entries when searching for account codes.
BOC Code	Enter the BOC code manually, or use the Lookup (Magnifying Glass) to search for and select a BOC code.
Active	Mark this checkbox to indicate that the account code will be active when saved; remove the checkmark to indicate that the account code should remain inactive after it is saved.
Import Entire Account Code	Select this link to import an existing account code by searching for and selecting the code.
Segment Label Name column	This column displays each of the segments in the account code.
Label Value column	For each segment, either enter the value manually, or use the Lookup (Magnifying Glass) to search for and select the value.

MANAGE P-CARD APPROVAL LIST

The **P-Card Approval List** option available from the Actions menu on the User Profile Administration screen allows you to maintain the list of users for whom the currently selected user serves as the Approving Official. The following steps describe how to manage this list by adding and removing users:

1. From the Purchasing/Contracting Main menu select **System Admin** > **User Profiles**. This will open the User Profile List screen shown in Figure 112.
2. Select the link for the user in the Code column on the User Profile List screen.
3. Select **P-Card Approval List** from the Actions menu. This will open the P-Card Approval List screen shown in Figure 120.

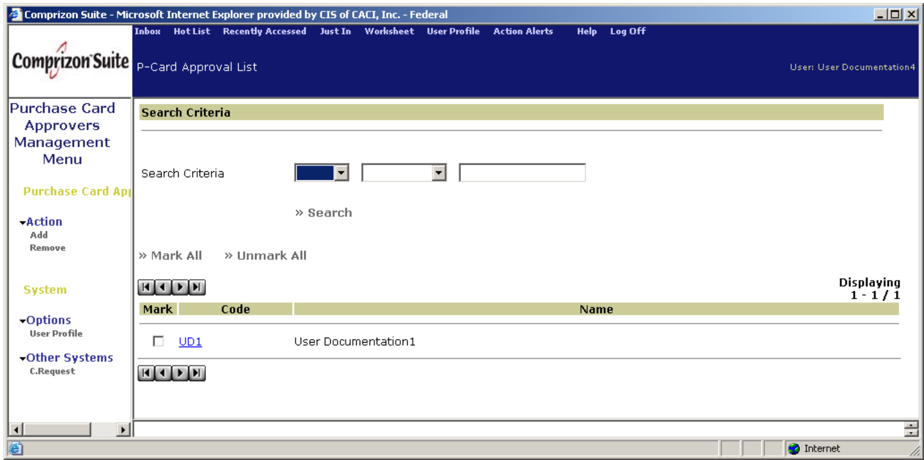

Figure 120. P-Card Approval List Screen

4. ***To add a user to the approval list***:

    a. Select **Add** from the Action menu on the P-Card Approval List screen. This will open the Cardholder Selection List screen shown in Figure 121, which displays all of the users who have been assigned cards.

    b. Mark the checkbox for the user you wish to add in the Mark column.

    c. Select **Add/Select** from the Actions menu.

TIP: Multiple users can be added simultaneously by marking the checkboxes for all of the users you wish to add before selecting Add/Select.

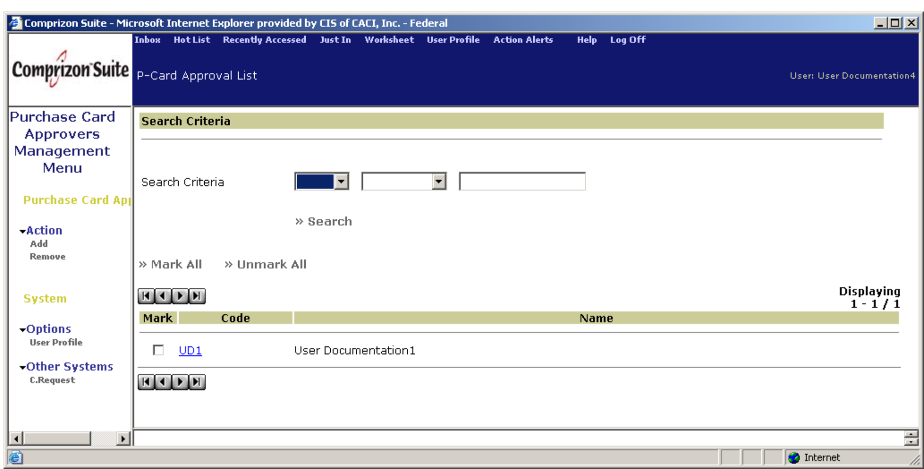

Figure 121. Cardholder Selection List Screen

5. ***To remove a user from the approval list***:

    a. Mark the checkbox for the user you wish to remove in the Mark column on the P-Card Approval List screen.

b. Select **Remove** from the Action menu.

TIP: Multiple entries can be deleted simultaneously by marking the checkboxes for all of the entries you wish to delete before selecting Delete.

MANAGE USER TEAMS

The creation of teams allows users within a team to share documents. System Administrators can create default teams for a user. In addition, users may set up and maintain their own teams. For more information on how users maintain teams, refer to the *Comprizon Suite User Manual*.

The following steps describe how to manage teams by creating, editing, and deleting teams, as well as managing team members and permissions.

1. From the Purchasing/Contracting Main menu select **System Admin** > **User Profiles**. This will open the User Profile List screen shown in Figure 112.
2. Select the link for the user in the Code column on the User Profile List screen.
3. Select **Teams** from the Actions menu on the User Profile Administration screen. This will open the Team Management screen shown in Figure 122.

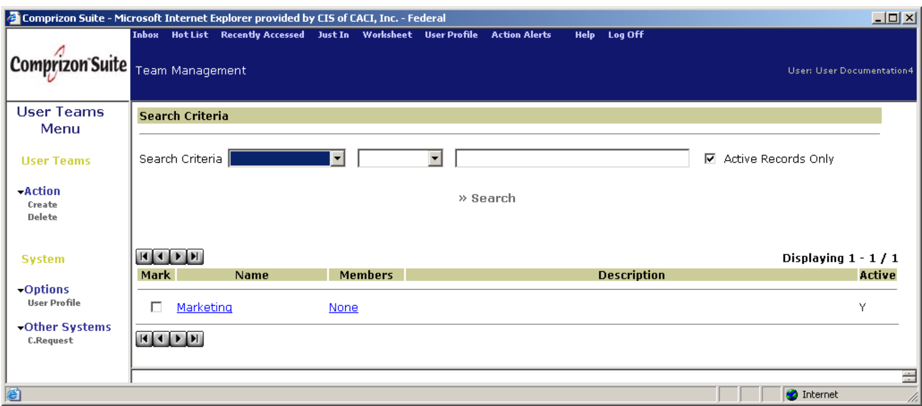

Figure 122. Team Management Screen

4. ***To create a team***:

a. Select **Create** from the Actions menu on the Team Management screen. This will open the Team Detail screen shown in Figure 123.

b. Enter a name for the team in the Name field and, if desired, enter a brief description in the **Description/Comments** field.

c. Next uncheck the **Active** checkbox if you wish for the team to remain inactive after it is created.

d. Select **Save** to save the information.

NOTE: The newly create team will not have any members. Refer to the following section for additional information for adding members to and removing members from a team.

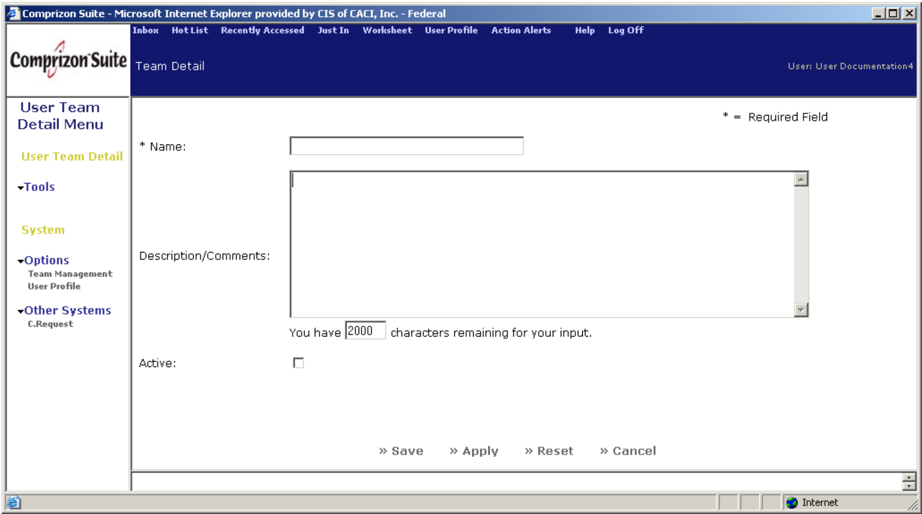

Figure 123. Team Detail Screen

5. ***To edit the details of an existing team***:
   a. Select that team's name on the Team Management screen. This will open the Team Detail screen.
   b. Make any necessary changes to the **Name** and/or **Description/Comments** fields.
   c. Select **Save** to save the changes.

NOTE: Information for managing team members can be found later in this section.

6. ***To delete an existing team***:
   a. Mark that team's checkbox on the Team Management screen.
   b. Select **Delete** from the Actions menu.

NOTE: The system will only allow the user to delete a team when all team members have been removed from the team.

TIP: Multiple entries can be deleted simultaneously by marking the checkboxes for all of the entries you wish to delete before selecting Delete.

7. ***To manage team members***:
   a. The number of members in a team will be displayed as a link in the Members column on the Team Management screen. Selecting this link will open the Team Members Management screen shown in Figure 124. This screen lists users who are already members of the team.

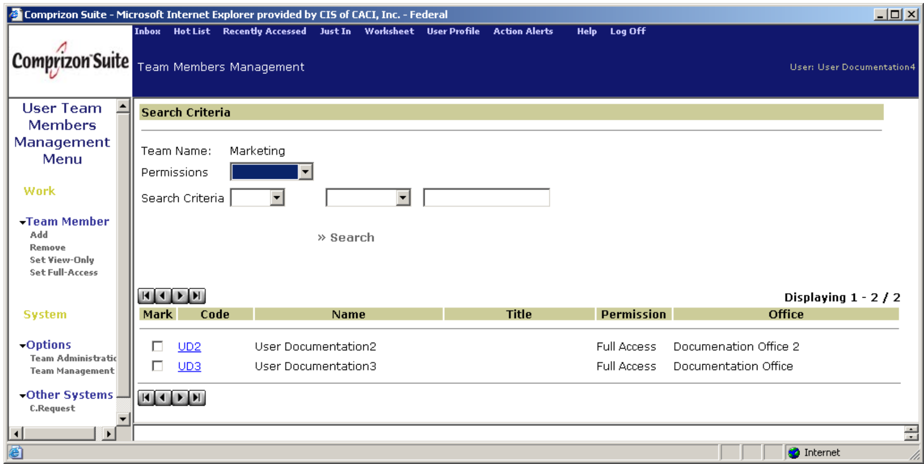

Figure 124. Team Members Management Screen

b. ***To add users to a team***:

Select **Add** from the Team Member menu. This will open the Create Team Members screen shown in Figure 125. Users who are already members of the team will be marked with an asterisk. To add a user, mark that user's checkbox in the Mark column, and then select **Add/Select** from the Actions menu.

TIP: Multiple users can be added to a team simultaneously by marking the checkboxes for all of the users you wish to add before selecting Add/Select.

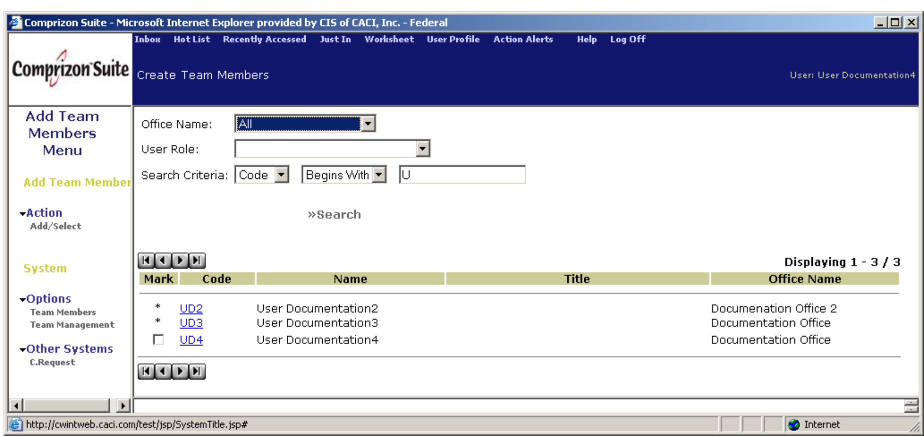

Figure 125. Create Team Members Screen

c. ***To remove users from a team:***

To remove a user from the team, mark that user's checkbox in the Mark column on the Team Members Management screen, and then select **Remove** from the Team Member menu.

TIP: Multiple entries can be removed simultaneously by marking the checkboxes for all of the entries you wish to remove before selecting Remove.

---

d. ***To edit user permissions:***

The current permissions assigned to a user will be displayed in the Permission column on the Team Management screen. To change the permission given to a user, mark that user's checkbox in the Mark column on the Team Members Management screen, and then select one of the following from the Team Member menu:

- **Set View-Only** – allows the user to view documents that are shared among the team, but not to make changes.
- **Set Full-Access –** allows the user to edit documents that are shared among the team.

Chapter 7

OFFICE MANAGEMENT

IN THIS SECTION…

Office Management Overview

Assigning a user to an office provides default address and account information for that user. The address and accounting information for the office will serve as the default information for all users assigned to that office unless address and accounting information is set up at an individual user level. (For more information on defining address and accounting information for an individual user, refer to the *User Management* chapter.)

Manage Offices

The following steps describe how to manage offices, including creating offices, assigning and unassigning users, editing offices, and deleting offices.

1. From the Purchasing/Contracting Main menu select **System Admin** > **Offices**. This will open the Office Management screen shown in Figure 126.

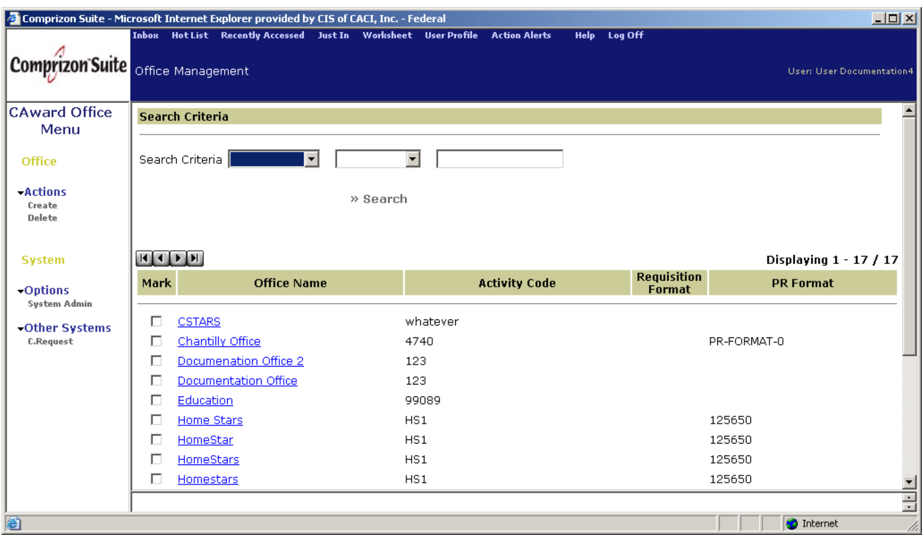

Figure 126. Office Management Screen

2. ***To create a new office:***

   a. Select **Create** from the Actions menu. The Office Administration screen displays. This screen consists of the following four tabs: Administration (Figure 127), Defaults (Figure 128), Addresses (Figure 129), and Surcharge (Figure 130).

   b. Enter information on this screen as described in Table 30 at the end of this section.

   c. Select **Save**.

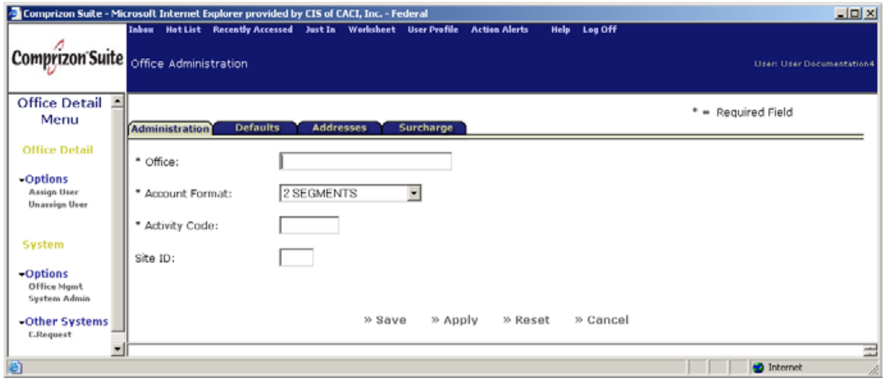

Figure 127. Office Administration Screen – Administration Tab

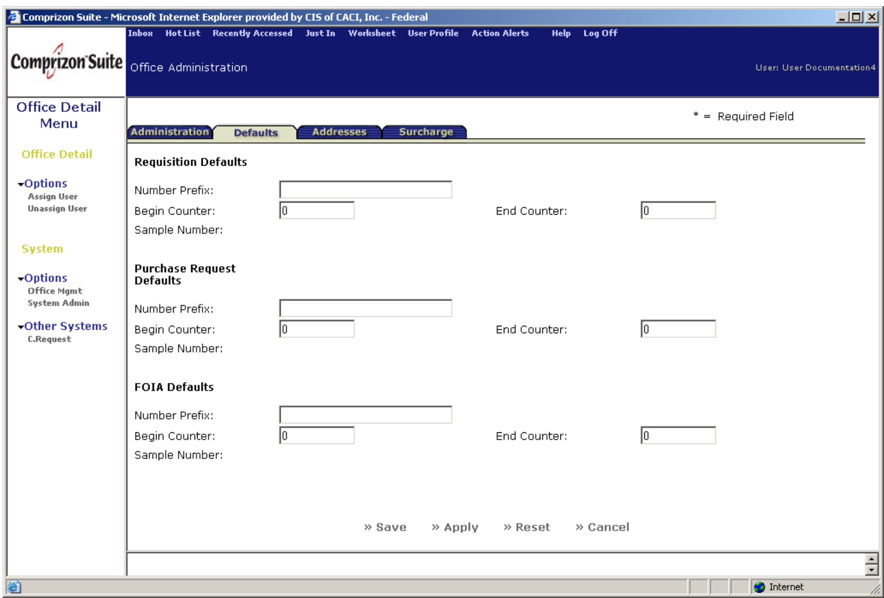

Figure 128. Office Administration Screen - Defaults Tab

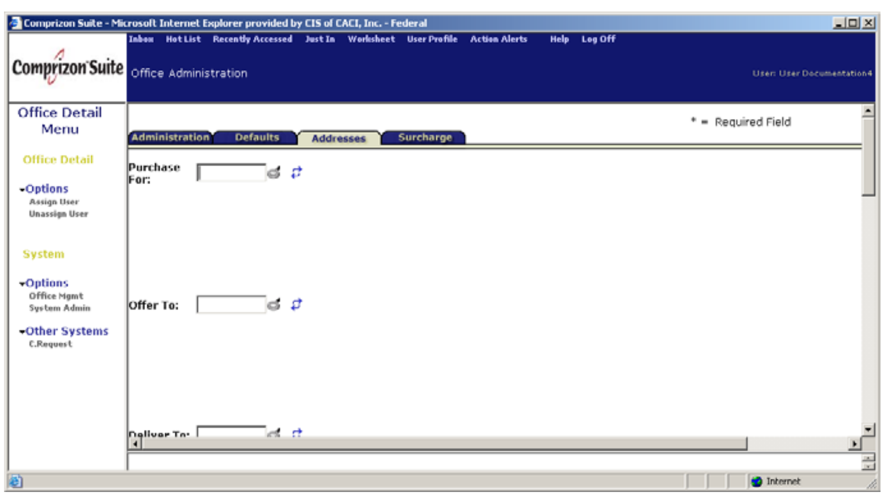

Figure 129. Office Administration Screen - Addresses Tab

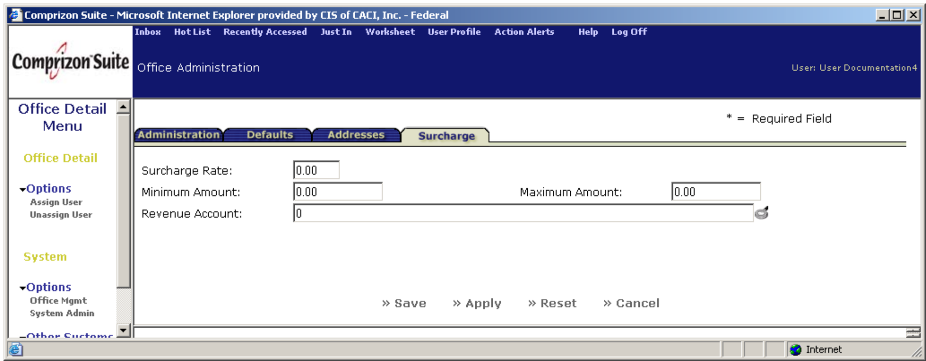

Figure 130. Office Administration Screen - Surcharge Tab

3. ***To manage users assigned to an office:***

a. ***To assign a user to an office:***

Select **Assign User** from the Options menu on the Office Administration screen. The Assign Users To Office screen shown in Figure 131 displays. To assign a user, mark that user's checkbox in the Mark column, and then select **Save**.

NOTE: A user may only be assigned to one office. If you are attempting to add a user to an office when they are already assigned to an office, then they will be unassigned from the previous office and assigned to the new office.

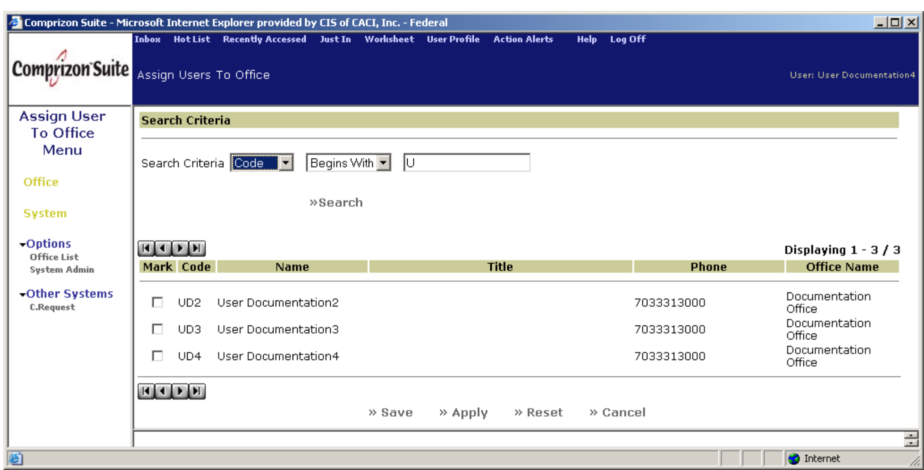

Figure 131. Assign Users To Office Screen

b. ***To unassign users to an office:***

To unassign a user that is currently assigned to an office, first select that office's link on the Office Management screen. This will open the Office Administration screen for that office. Select Unassign User from the Options menu. This will open the Unassign Users To Office screen shown in Figure 132, which displays all of the users currently assigned to that office. Mark the checkbox in the Mark column for the user you wish to unassign, and then select **Save**.

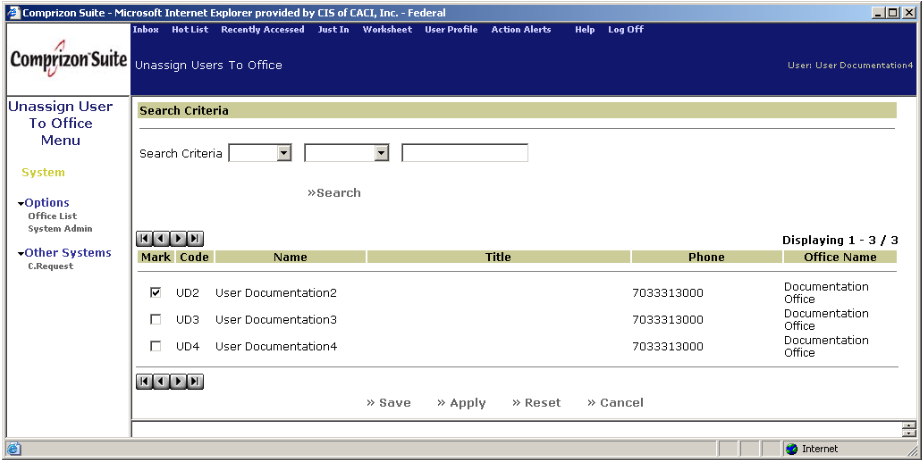

Figure 132. Unassign Users To Office Screen

4. ***To edit an existing office:***
   a. Select the office's link on the Office Management screen. This will open the Office Administration screen for that office.
   b. Make any necessary changes.
   c. select **Save** to save changes.

5. ***To delete an existing office:***
   a. Mark the office's checkbox on the Office Management screen.
   b. Select **Delete** from the Actions menu.

NOTE: The system will only allow you to delete an office when all users have been removed from the office.

TIP: Multiple entries can be deleted simultaneously by marking the checkboxes for all of the entries you wish to delete before selecting Delete.

Table 30. Office Administration Screen Field Descriptions

Field	Description
Administration Tab	
Office	Enter the name for the office.

Account Format	Select the account format from the drop-down list provided.
Activity Code	Enter the activity code.
Site ID	Enter the site ID. This site ID will be used for tracking Accounting Document Numbers (ADN).
Defaults Tab	
NOTE: This tab consists of three sections (Requisition Defaults, Purchase Request Defaults, and FOIA Defaults). Each section contains the fields described below.	
Number Prefix	Enter the number prefix (i.e., characters that will begin before the number).
Begin Counter	Enter the number at which the counter will begin.
End Counter	Enter the number at which the counter will end.
Sample Number	This field displays a sample number based on the Number Prefix, Begin Counter, and End Counter.
Addresses Tab	
Purchase For	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address.
Offer To	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address.
Deliver To	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address.
Ultimate Destination	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address.
Contracting Office	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address.
Issued By	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address.
Admin By	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address.
Invoice To	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address.
Payment Office	Enter the appropriate address code, or use the Lookup (Magnifying Glass) to search for and select an address.
Surcharge Tab	
Surcharge Rate	Enter the surcharge rate.
Minimum Amount	Enter the minimum amount.
Maximum Amount	Enter the maximum amount.
Revenue Account	Enter the revenue account either manually or by using the Lookup (Magnifying Glass) to search for and select the appropriate value.

Chapter 8

SITE TEAM MANAGEMENT

IN THIS SECTION…

SITE TEAM OVERVIEW

When users share documents, they have the option of sharing with teams that they as individual users have created or with site teams. Site teams are teams that are created and maintained by the system administrator and are available to all users assigned to that site.

MANAGING SITE TEAMS

The following steps describe how to manage site teams, including creating, editing, and deleting site teams, and managing team members and their permissions.

1. From the Purchasing/Contracting Main menu select **System Admin** > **Teams**. This will open the Team Management screen shown in Figure 133.

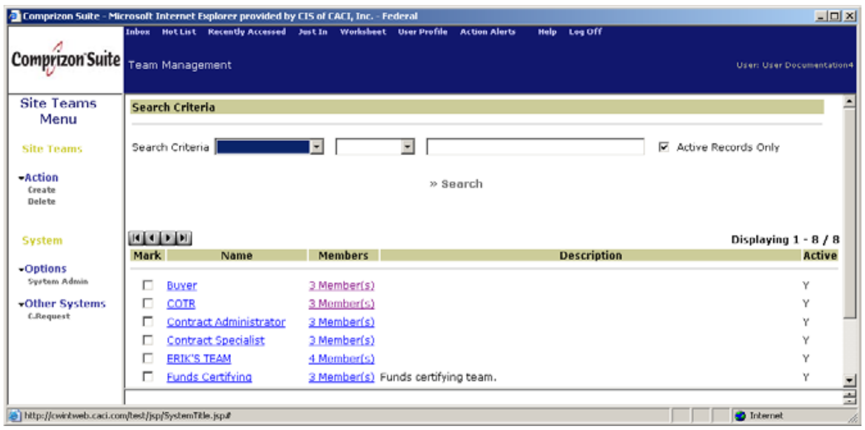

Figure 133. Team Management Screen

2. ***To create a site team:***

   a. Select **Create** from the Action menu on the Team Management screen. This will open the Team Detail screen shown in Figure 134.

   b. Enter a name for the team in the **Name** field and, if desired, enter a brief description in the **Description/Comments** field.

   c. Next uncheck the **Active** checkbox if you wish for the team to remain inactive after it is created.

   d. Select **Save** to save the information.

NOTE: The newly create team will not have any members. Refer to the following section for additional information for adding members to and removing members from a team.

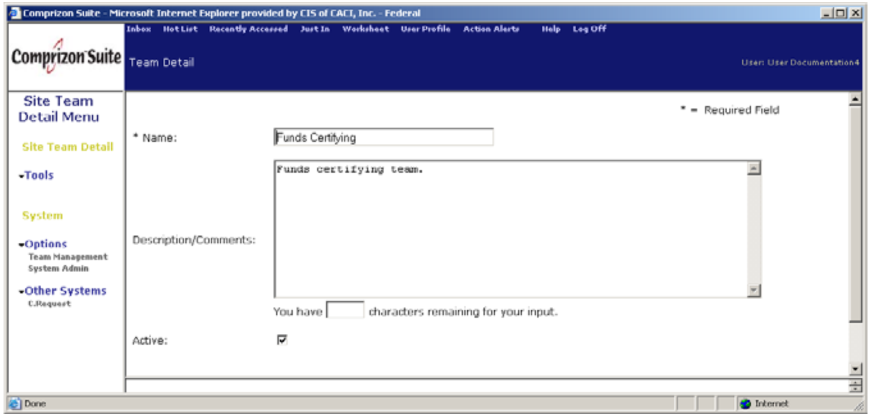

Figure 134. Team Detail Screen

3. ***To manage site team members:***

Site team management allows you to add users, remove users, and control user permissions.

The number of members in a site team will be displayed as a link in the Members column on the Team Management screen. Selecting this link will open the Team Members Management screen shown in Figure 135. This screen lists users who are already members of the team.

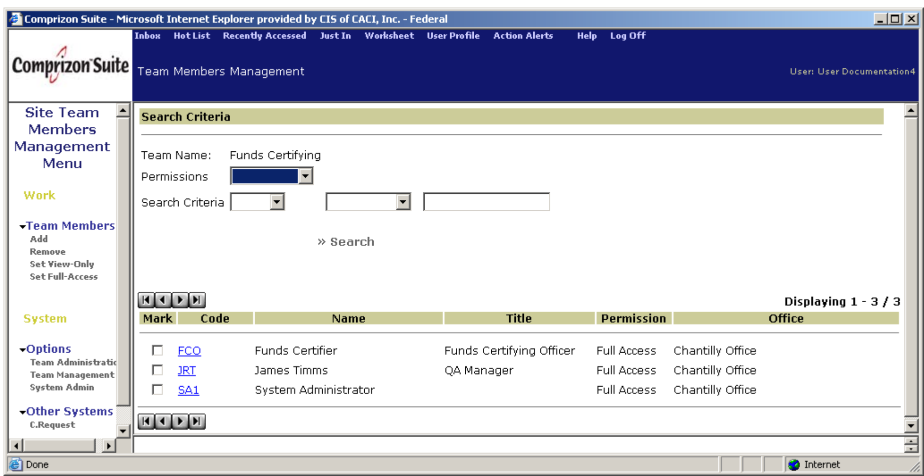

Figure 135. Team Members Management Screen

a. ***To add users to a site team:***

Select the link in the Members column for the team, and then select **Add** from the Actions menu on the Team Members Management screen. This will open the Create Team Members screen shown in Figure 136. Users who are already members of the team will be marked with an asterisk.

To add a user, mark that user's checkbox in the Mark column. Select **Add/Select** from the Actions menu.

TIP: Multiple users can be added to a team simultaneously by marking the checkboxes for all of the users you wish to add before selecting Add/Select.

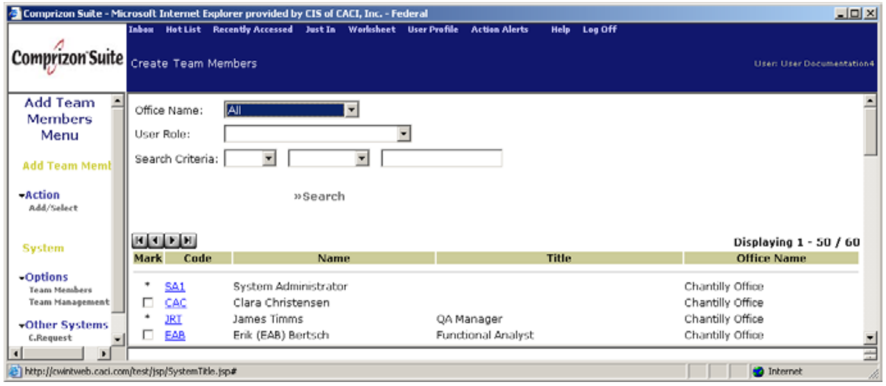

Figure 136. Create Team Members Screen

b. ***To remove users from a site team:***

To remove a user from a site team, mark that user's checkbox in the Mark column on the Team Members Management screen, and then select **Remove** from the Actions menu.

TIP: Multiple entries can be removed simultaneously by marking the checkboxes for all of the entries you wish to remove before selecting Remove.

---

c. ***To control access permissions for team members:***

A site team member's current access permissions will be displayed in the Permission column on the Team Members Management screen. To edit access permission for a user, mark the checkbox for that user in the Mark column, and then select one of the following from the Team Members menu:

- **Set View-Only** – allows the user to view documents that have been shared with them, but not to make changes.
- **Set Full-Access** – allows the user to edit documents that are shared among the team.

4. ***To edit an existing site team's details (not members):***

a. Select that team's name on the Team Management screen. This will open the Team Detail screen.

b. Make any necessary changes to the **Name** and/or **Description/Comments** fields.

c. Select **Save** to save the changes.

5. ***Delete an Existing Team***

a. Mark that team's checkbox on the Team Management screen.

b. Select **Delete** from the Actions menu.

NOTE: All members must be removed from a team before the team can be deleted.

TIP: Multiple entries can be deleted simultaneously by marking the checkboxes for all of the entries you wish to delete before selecting Delete.

Chapter 9

Credit Card Management

In This Section…

Credit Card Management Overview

ComprizonSuite credit card management functions allow you to manage card assignments as well as import transactions from the financial system for reconciliation.

Manage Credit Card Assignment Records

The following steps describe how to create, edit, and delete credit card assignment records.

1. From the Purchasing/Contracting Main menu select **System Admin** > **Credit Card Mgmt**. This will open the Credit Card Management screen shown in Figure 137.

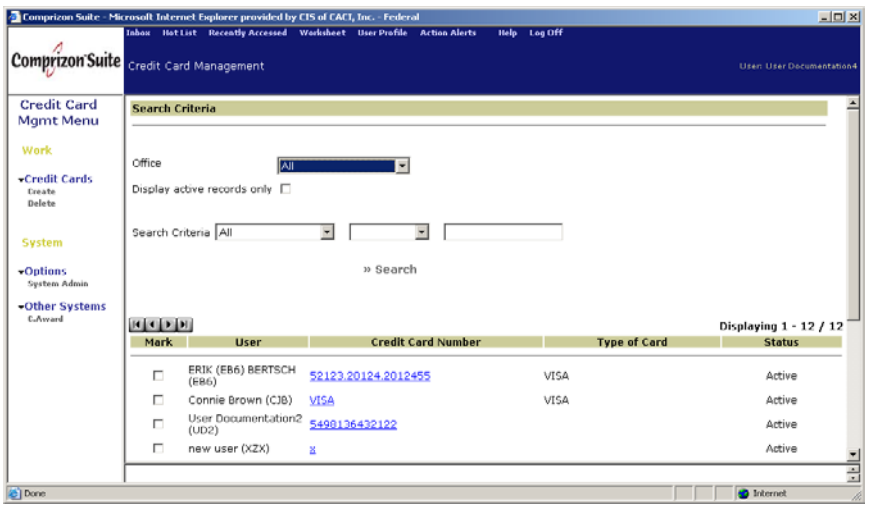

Figure 137. Credit Card Management Screen

2. ***To create a new credit card assignment record:***
   a. Select **Create** from the Credit Cards menu. This will open the Credit Card Detail screen shown in Figure 138.
   b. Enter the information as described in Table 31 at the end of this section.
   c. Select **Save** when you have finished entering information.

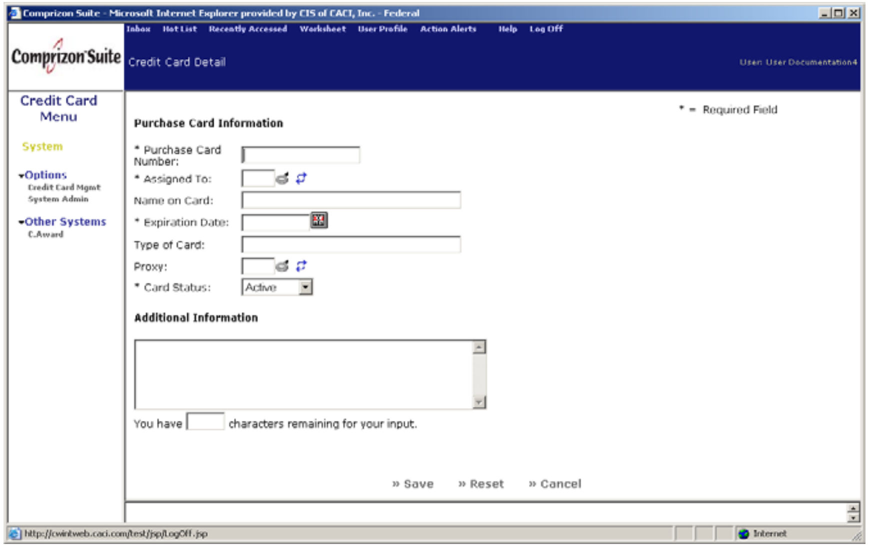

Figure 138. Credit Card Detail Screen

3. ***To edit an existing credit card record:***
   a. Select the card number for that card from the Credit Card Number column on the Credit Card Management screen. This will open the Credit Card Detail screen for the card you selected.
   b. Make any necessary changes.
   c. Select **Save**.

4. ***To delete an existing credit card record:***
   a. Mark the checkbox for that card in the Mark column on the Credit Card Management screen.
   b. Select **Delete** from the Credit Cards menu.

TIP: Multiple entries can be removed simultaneously by marking the checkboxes for all of the entries you wish to remove before selecting Remove.

Table 31. Credit Card Detail Screen Field Descriptions

Field	Description
Purchase Card Number	Enter the number of the card.
Assigned To	Enter the user code for the user to whom the card is assigned, or use the Lookup (Magnifying Glass) to search for and select the user.
Name on the Card	Enter the name of the cardholder as it appears on the card.
Expiration Date	Enter the date that the card expires.

Type of Card	Enter the type of card.
Proxy	Enter the user code for the user who serves as the proxy, or use the Lookup (Magnifying Glass) to search for and select the user.
Card Status	Select the status of the card (Active, Not Active, or Lost) from the drop-down list provided.
Additional Information	Enter any additional information in this field. The counter below the field indicates the maximum number of remaining characters.

IMPORT TRANSACTION STATEMENTS

P-Card reconciliation allows you to import statement transaction data from the financial institution and reconcile these statements with procurement documents in ComprizonSuite. The following steps describe how the system administrator import transaction statements:

1. Select **P-Card Reconciliation** from the Options menu on the Purchasing / Contracting Main Menu. This will open the Reconciliation Management screen.
2. Select **Import** from the System Admin menu on the Reconciliation Management screen. This will open the Import Statement Transaction Detail screen shown in Figure 139, which displays all of the transaction files available for import.

Figure 139. Import Statement Transaction Detail Screen

3. Mark the checkbox for the file in the Mark column.
4. Select **Import** from the Actions menu.

NOTE: Additional reconciliation functions that are available are described in *the Comprizon Suite User Manual*.

Chapter 10

VENDOR MANAGEMENT

IN THIS SECTION…

VENDOR MANAGEMENT OVERVIEW

ComprizonSuite's vendor management functions allow you to manage vendor records (e.g., create vendors, match vendors, etc.).

MANAGE VENDOR RECORDS

The following steps describe how to manually create a new vendor, match a vendor, unmatch a vendor, edit an existing vendor record, and delete a vendor record.

1. Select **Vendor Mgmt** from the Vendors menu on the Purchasing / Contracting Main Menu in the C.Award module. This will open the Vendor Management screen shown in Figure 140.

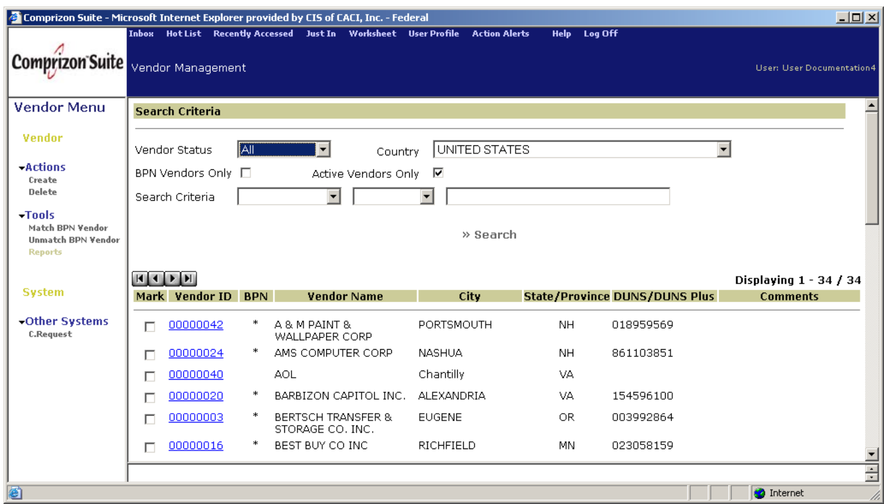

Figure 140. Vendor Management Screen

2. ***To manually create a new vendor:***

   a. Select **Create** from the Actions menu. The Vendor Detail screen displays. This screen consists of the following six tabs: Administration (Figure 141), Identification (Figure 142), Addresses (Figure 143), Products and Services (Figure 144), Financial (Figure 145), and Additional Data (Figure 146).

   b. Use the Select BPN Vendor link to search for and select a vendor listed in the BPN, or enter information on this screen as described in Table 32 at the end of this section.

NOTE: If you use the Select BPN Vendor link to create the vendor record, then the vendor will automatically be matched.

NOTE: If the site has been configured to allow users to only add BPN vendors, you will not be allowed to manually enter vendor information' you will only be allowed to use the Select BPN Vendor link.

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   c. Select **Save**.

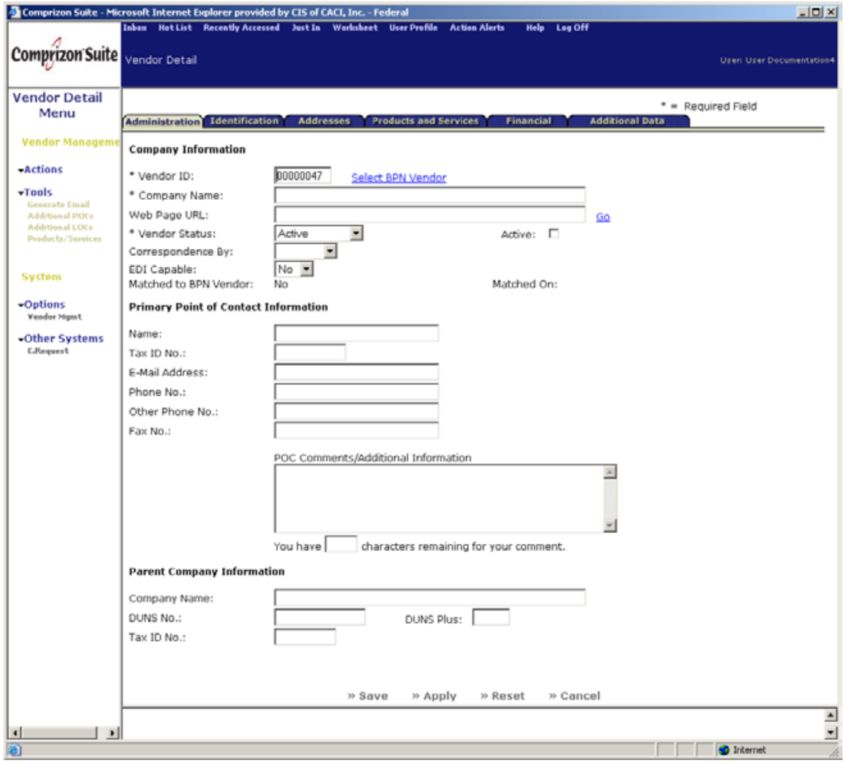

Figure 141. Vendor Detail Screen – Administration Tab

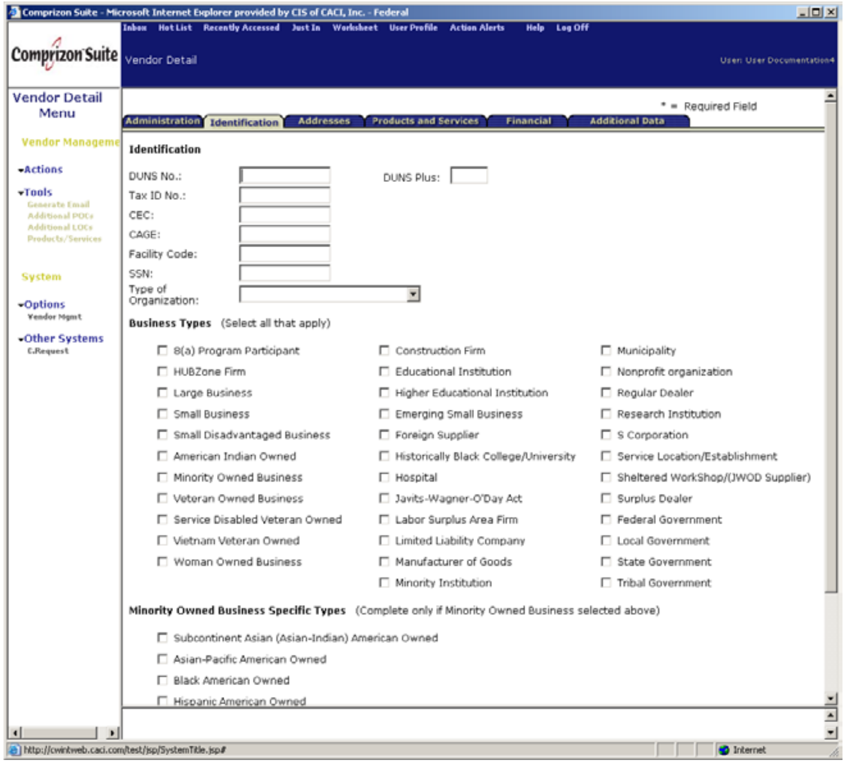

Figure 142. Vendor Detail Screen – Identification Tab

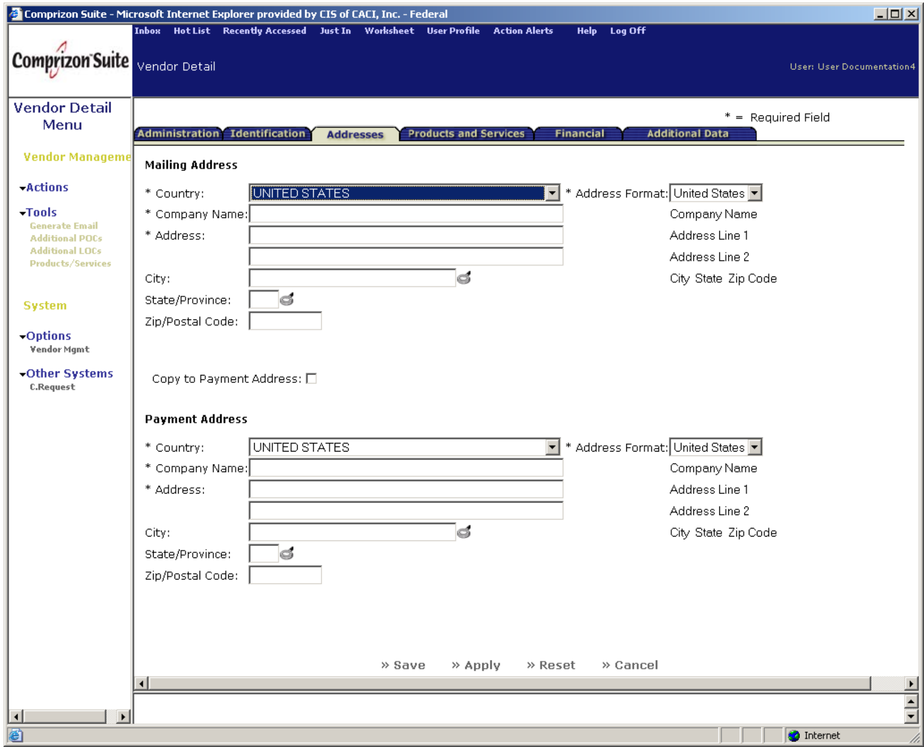

Figure 143. Vendor Detail Screen – Addresses Tab

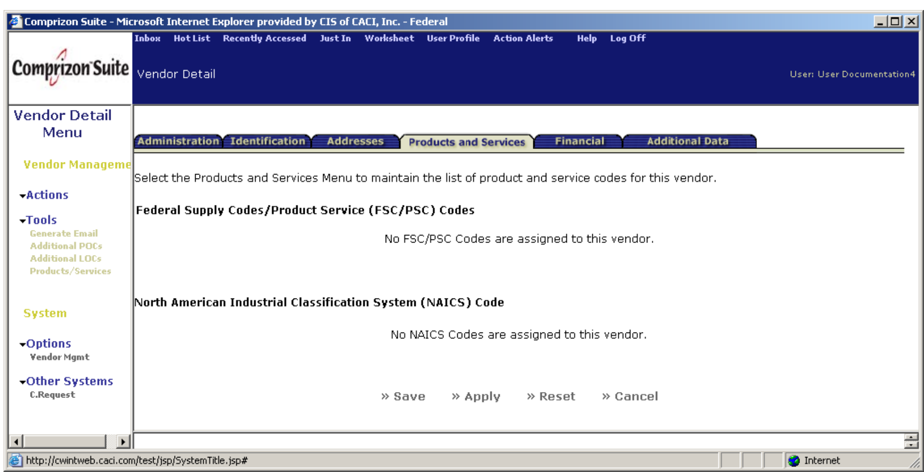

Figure 144. Vendor Detail Screen – Products and Services Tab

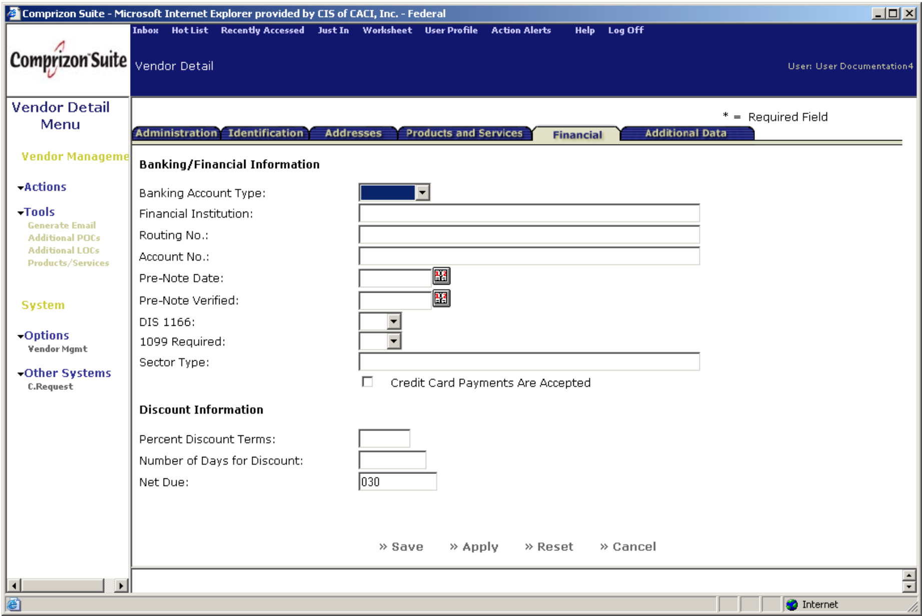

Figure 145. Vendor Detail Screen - Financial Tab

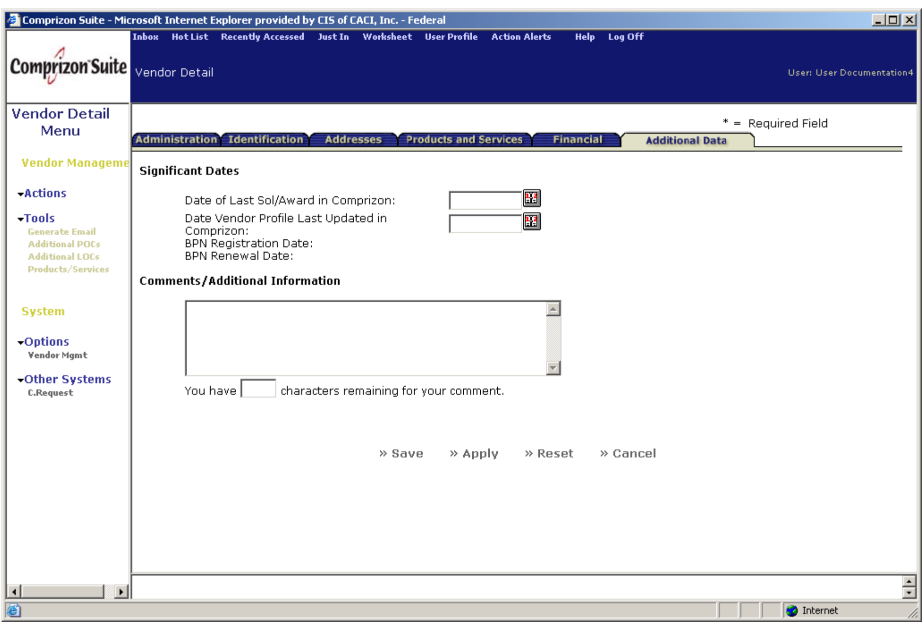

Figure 146. Vendor Detail Screen - Additional Tab

3. ***Match BPN Vendor***

    a. Mark the checkbox in the Mark column on the Vendor Management screen for the vendor you wish to match

    b. Select **Match BPN Vendor** from the Tools menu. This will open the BPN Vendor Search screen.

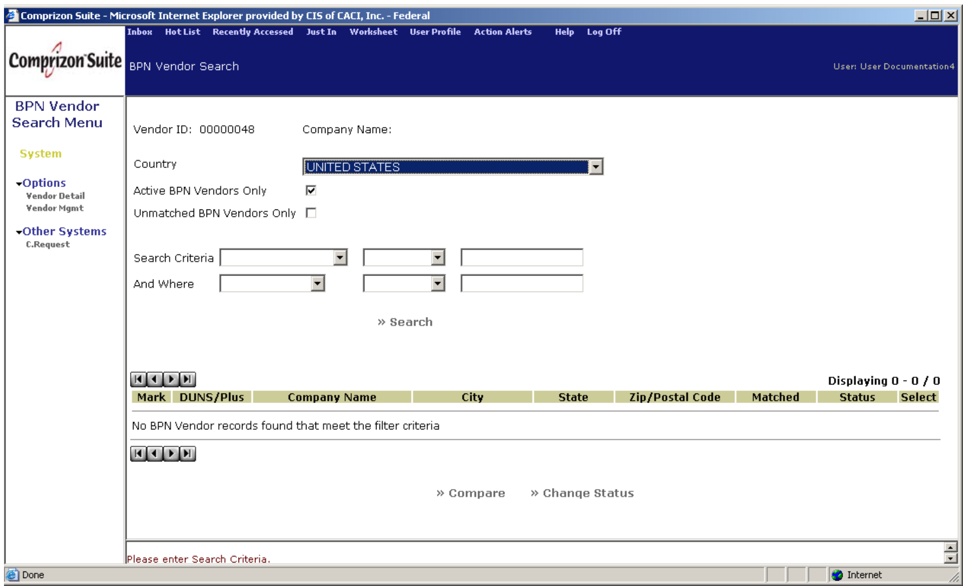

Figure 147. BPN Vendor Search Screen

    c. Enter search criteria to find the desired BPN vendor.

    d. When the correct BPN vendor is found, select the vendor by clicking on the Select icon. The system will add match the system vendor to the BPN vendor.

4. ***Edit an Existing Vendor***

    a. Select the vendor's link in the Vendor ID column on the Vendor Management screen. This will open the Vendor Administration screen for that Vendor.

    b. Make any necessary changes. If the vendor has been matched to a BPN vendor, not all fields will be editable.

    c. Select **Save**.

5. ***Unmatch Vendor***

    a. Mark the checkbox for the vendor in the Mark column on the Vendor Management screen.

    b. Select **Unmatch BPN Vendor** from the tools menu. The system will unmatch the vendor record.

NOTE: You may also unmatch a vendor by selecting the **Unmatch BPN Vendor** link within the vendor's Vendor Detail screen.

6. ***Delete an Existing Vendor***
   a. Mark the vendor's checkbox on the Vendor Management screen.
   b. Select **Delete** from the Actions menu.

NOTE: You may not delete a vendor that is a BPN matched vendor or associated with a procurement action.

TIP: Multiple entries can be deleted simultaneously by marking the checkboxes for all of the entries you wish to delete before selecting Delete.

Table 32. Vendor Detail Screen Field Descriptions

Field	Description
Administration Tab	
Company Information.	
Vendor ID	This field is automatically generated by system.
Company Name	Enter the activity code.
Web Page URL	Enter the Web Page for this vendor.
Vendor Status	Select the Vendor Status from the drop-down list provided.
Active	Mark this checkbox if this vendor is an Active vendor.
Correspondence By	Select the method of correspondence from the drop-down list provided.
EDI Capable	Select either "Yes" or "No" from the drop-down list provided.
Matched to BPN Vendor	This field is automatically generated by system.
Matched On	If the vendor has been matched to a BPN vendor, this field displays the date the vendor was matched.
Primary Point of Contact Information	
Name	Enter the name of the Primary Point of Contact (POC) for this vendor
Tax ID No.	Enter the Tax ID No.
E-Mail Address	Enter the email address for the POC.
Phone No.	Enter the primary phone number for the POC.
Other Phone No.	Enter alternate phone number (e.g., cell phone, toll-free, etc.) for POC.
Fax No.	Enter the fax number for the POC.
POC Comments / Additional Information	Enter any comments that pertain to the POC.
Parent Company Information	
Company Name	Enter the Parent Company Name for this Vendor.

DUNS No.	Enter the DUNS No for the Parent Company.
DUNS Plus	Enter the DUNS Plus for the Parent Company.
Tax ID No	Enter the tax ID for the Parent Company.
Identification Tab	
Identification	
Duns No	Enter the DUNS No for the Vendor.
Duns Plus	Enter the DUNS Plus for the Vendor.
Tax ID No.	Enter the tax ID for the Vendor.
CEC	Enter the CEC for the Vendor.
CAGE	Enter the CAGE Code for the Vendor.
Facility Code	Enter the Facility Code for the Vendor.
SSN	Enter the SSN for the Vendor.
Type of Organization	Select the Type of Organization from the Drop Down list.
Business Types	
In this section, mark the checkboxes for all business types that apply.	
Minority Owned Business Specific Types	
If the Minority Owned Business option is selected under Business Type, then select the appropriate type of Minority Owned Business from this section.	
Addresses Tab	
Mailing Address	
Country	Select Country from the drop-down list provided.
Address Format	Select Address Format from the drop-down list provided.
Company Name	Enter Company Name for this Vendor.
Address	Enter Mailing Address Line 1 for this Vendor.
	Enter Mailing Address Line 2 for this Vendor.
City	Enter City for the Mailing Address for this Vendor.
State / Province	Enter State Code for the Mailing Address for this Vendor.
Zip / Postal Code	Enter Zip / Postal Code for the Mailing Address for this Vendor.
Copy to Payment Address	Mark this checkbox to have the system copy the Mailing Address to the Payment Address.
Payment Address	
Country	Select Country from the drop-down list provided.
Address Format	Select Address Format from the drop-down list provided.
Company Name	Enter Company Name for this Vendor.
Address	Enter Payment Address Line 1 for this Vendor.
	Enter Payment Address Line 2 for this Vendor.
City	Enter City for the Payment Address for this Vendor.
State / Province	Enter State Code for the Payment Address for this Vendor.
Zip / Postal Code	Enter Zip / Postal Code for the Payment Address for this Vendor.
Products and Services Tab	

Federal Supply Codes / Product Service (FSC / PSC) Codes	
Automatically populated as procurement actions are associated with the vendor.	
North American Industrial Classification System (NAICS) Code	
Automatically populated as procurement actions are associated with the vendor.	
Financial Tab	
Banking / Financial Information	
Banking Account Type	Select Banking Account Type from the drop-down list provided.
Financial Institution	Enter Financial Institution for this Vendor.
Routing No.	Enter Routing No. for this Vendor.
Account No.	Enter Account No. for this Vendor.
Pre-Note Date	Enter Pre-Note Date for this Vendor.
Pre-Note Verified	Enter Date Pre-Note was Verified for this Vendor.
DIS 1166	Select DIS 1166 information from the drop-down list provided.
1099 Required	Select 1099 Required option from the drop-down list provided.
Sector Type	Enter Sector Type for this Vendor.
Credit Card Payments are Accepted	Mark this checkbox if Vendor accepts Credit Card Payments.
Discount Information	
Percent Discount Terms	Enter Percent Discount Terms for this Vendor.
Number of Days for Discount	Enter Number of Days for Discount for this Vendor.
Net Due	Enter Net Due for this Vendor.
Additional Data Tab	
Date of Last Sol/Award in Comprizon	Enter the date either manually in the DD/MM/YYYY format, or use the Calendar to search for and select the date.
Date Vendor Profile Last Updated in Comprizon	Enter the date either manually in the DD/MM/YYYY format, or use the Calendar to search for and select the date.
BPN Registration Date	Displays the BPN registration date.
BPN Renewal Date	Displays the BPN renewal date.
Comments / Additional Information	Enter any additional comments or information regarding this Vendor

MANAGE ADDITIONAL POCS

When creating or editing a vendor, you may define the primary point of contact (POC) on the Vendor Detail screen. The Additional POCs option in the Tools menu on the Vendor Detail screen allows you to enter any additional POCs for the vendor. The following steps describe how to add, edit, and delete additional POCs for a vendor.

1. Select **Vendor Mgmt** from the Vendors menu on the Purchasing / Contracting Main Menu in the C.Award module. This will open the Vendor Management screen shown in Figure 140.
2. Select the link for the vendor in the Vendor ID column. This will open the Vendor Detail screen for the vendor you selected.
3. Select **Additional POCs** from the Tools menu. This will open the Vendor POC Management screen shown in Figure 148, which allows you to add, edit, and delete additional POCs.

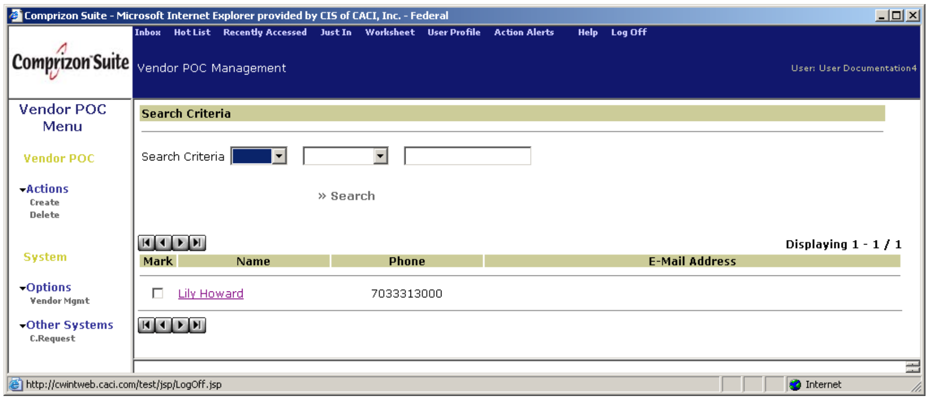

Figure 148. Vendor POC Management Screen

4. ***To add an additional POC:***

   a. Select **Create** from the Actions menu on the Vendor POC Management screen. This will open the Vendor Point Of Contact Detail screen shown in Figure 149.

   b. Enter the information as described in Table 33 at the end of this section.

   c. Select **Save** when you have entered the information for the POC.

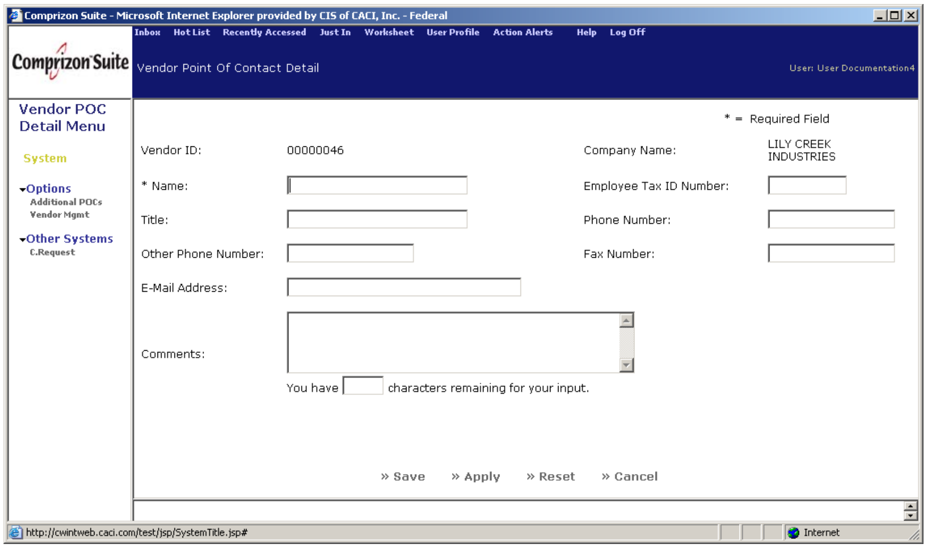

Figure 149. Vendor Point of Contact Detail Screen

5. ***Edit Existing Additional POC:***
   a. Select the link for that POC in the Name column on the Vendor POC Management screen. This will open the Vendor Point of Contact Detail screen for the POC.
   b. Make any necessary changes.
   c. Select **Save**.

6. ***Delete Existing Additional POC:***
   a. Mark the checkbox for that POC in the Mark column on the Vendor POC Management screen.
   b. Select **Delete** from the Actions column.

TIP: Multiple entries can be removed simultaneously by marking the checkboxes for all of the entries you wish to remove before selecting Remove.

Table 33. Vendor Point of Contact Detail Screen Field Descriptions

Field	Description
Vendor ID	Displays the vendor ID of the vendor for whom you are adding the additional POC.
Company Name	Displays the name of the vendor for whom you are adding the additional POC.
Name	Enter the name of the Primary Point of Contact (POC) for this vendor
Employee Tax ID No.	Enter the Tax ID No.
Title	Enter the title for the POC
Phone Number.	Enter the primary phone number for the POC.
Other Phone Number.	Enter alternate phone number (e.g., cell phone, toll-free, etc.) for POC.
Fax Number.	Enter the fax number for the POC.
E-Mail Address	Enter the email address for the POC.
Comments	Enter any comments that pertain to the POC.

MANAGE ADDITIONAL LOCATIONS

When creating or editing a vendor, you may define additional locations for the vendor. The following steps describe how to add, edit, and delete additional locations.

1. Select **Vendor Mgmt** from the Vendors menu on the Purchasing / Contracting Main Menu in the C.Award module. This will open the Vendor Management screen shown in Figure 140.
2. Select the link for the vendor in the Vendor ID column. This will open the Vendor Detail screen for the vendor you selected.
3. Select **Additional LOCs** from the Tools menu. This will open the Vendor Management screen shown in Figure 150.

Figure 150. Vendor Management Screen

4. ***To add additional locations:***

   a. Select **Create** from the Actions menu. This will open the Vendor Other Location Detail screen. This screen consists of the following six tabs: Administration (Figure 151), Identification (Figure 152), Addresses (Figure 153), Products and Services (Figure 154), Financial (Figure 155), and Additional Data (Figure 156).

   b. Enter information on this screen as described in Table 34 at the end of this section.

   c. Select **Save**.

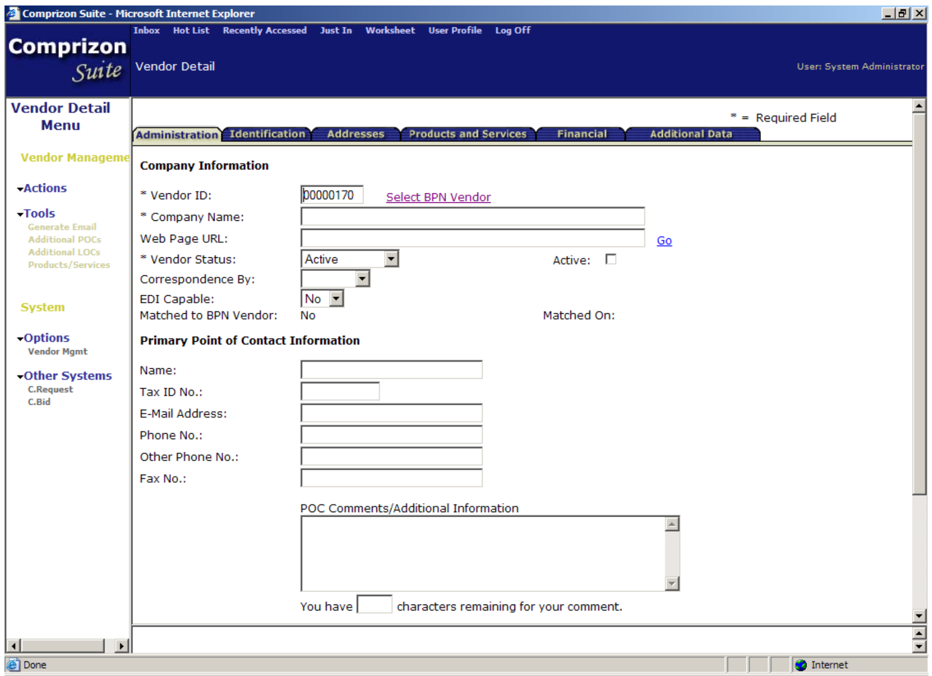

Figure 151. Vendor Other Location Detail Screen – Administration Tab

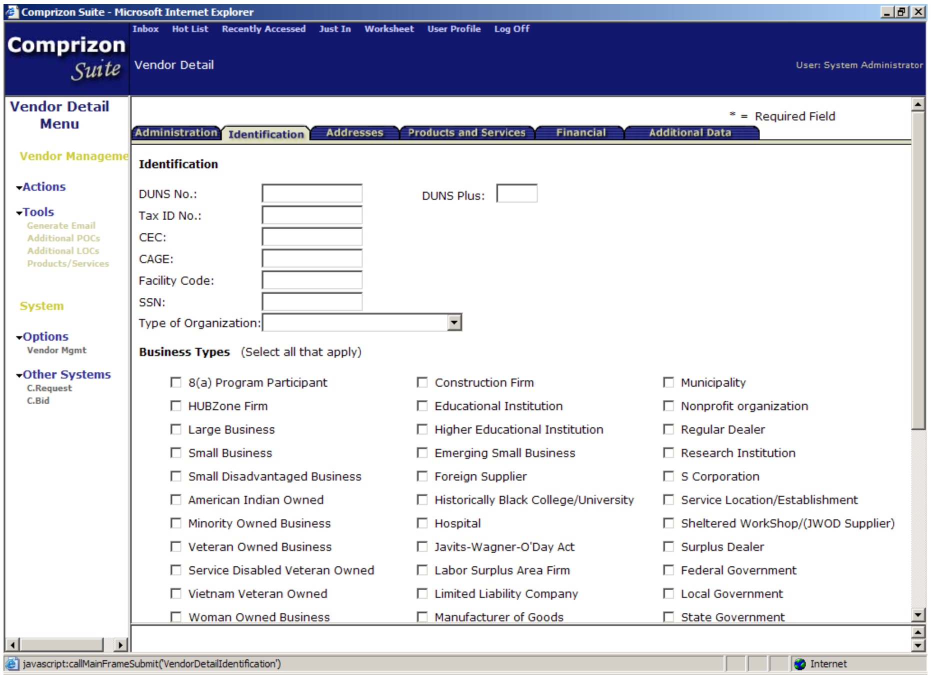

Figure 152. Vendor Other Location Detail Screen – Identification Tab

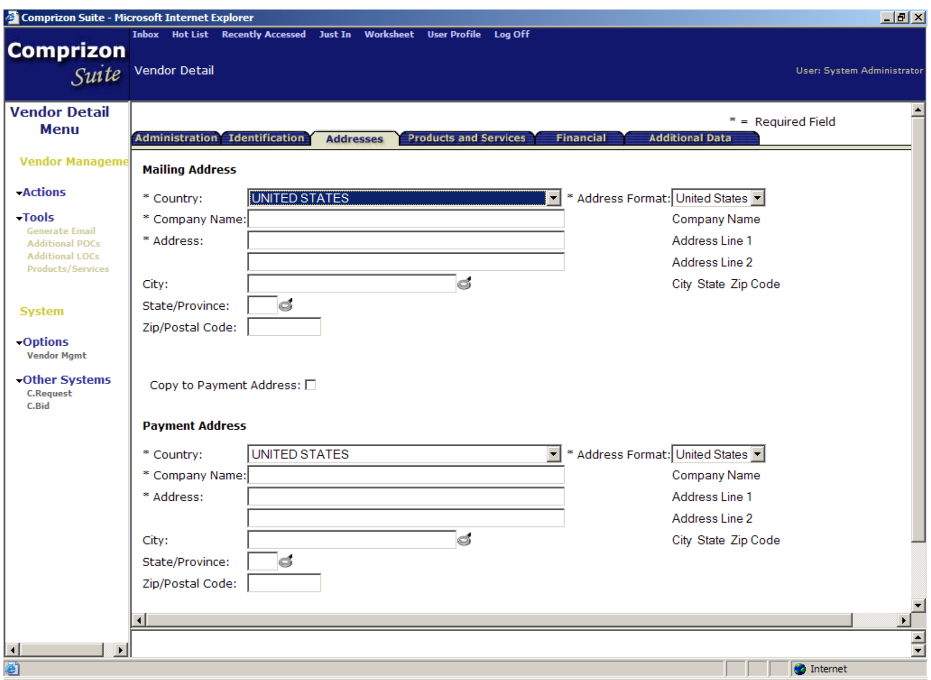

Figure 153. Vendor Other Location Detail Screen – Addresses Tab

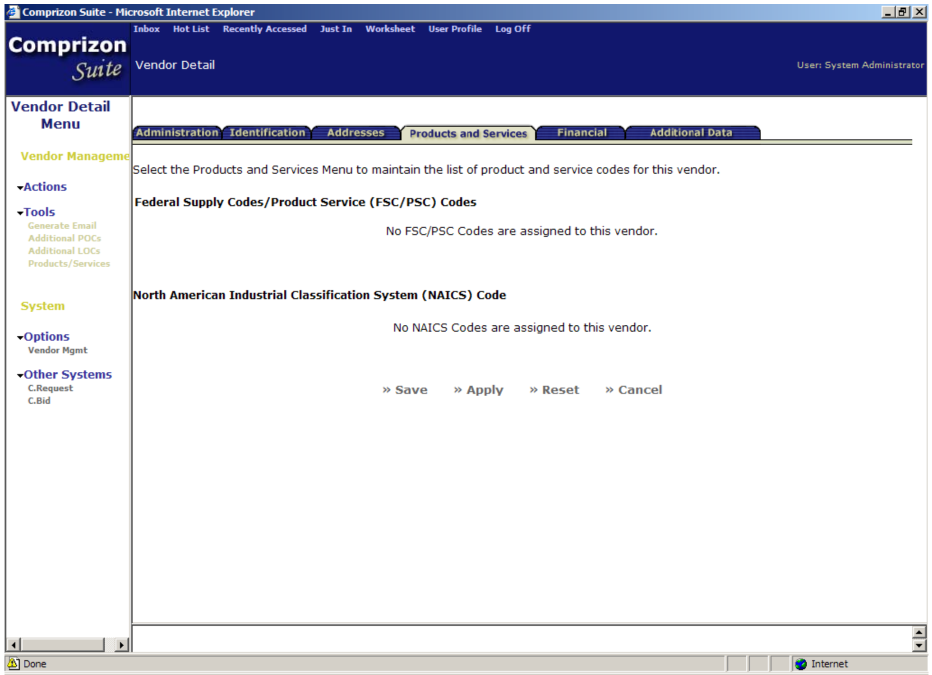

Figure 154. Vendor Other Location Detail Screen – Products and Services Tab

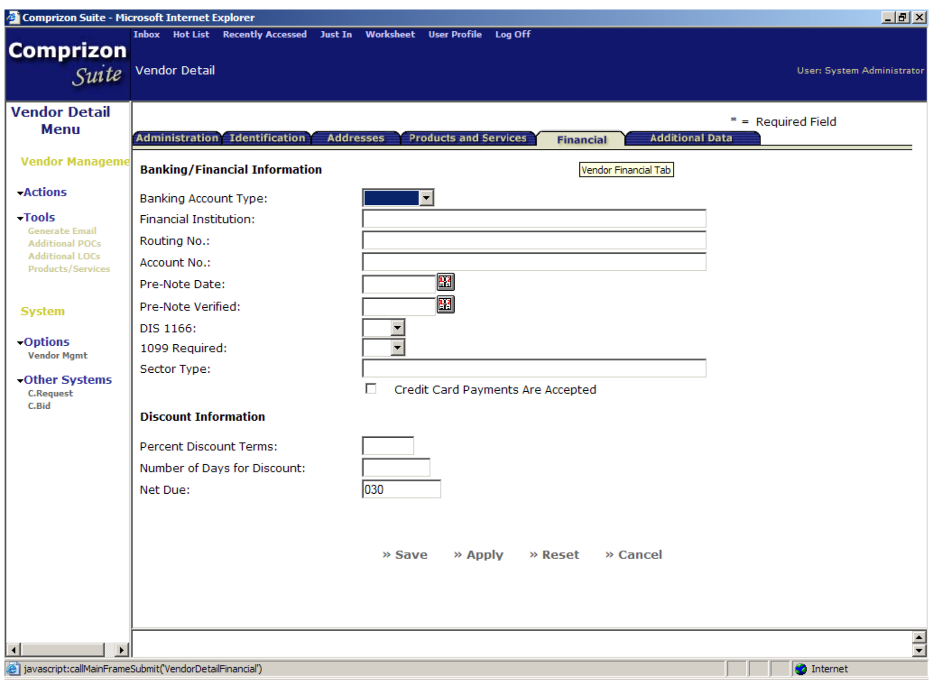

Figure 155. Vendor Other Location Detail Screen - Financial Tab

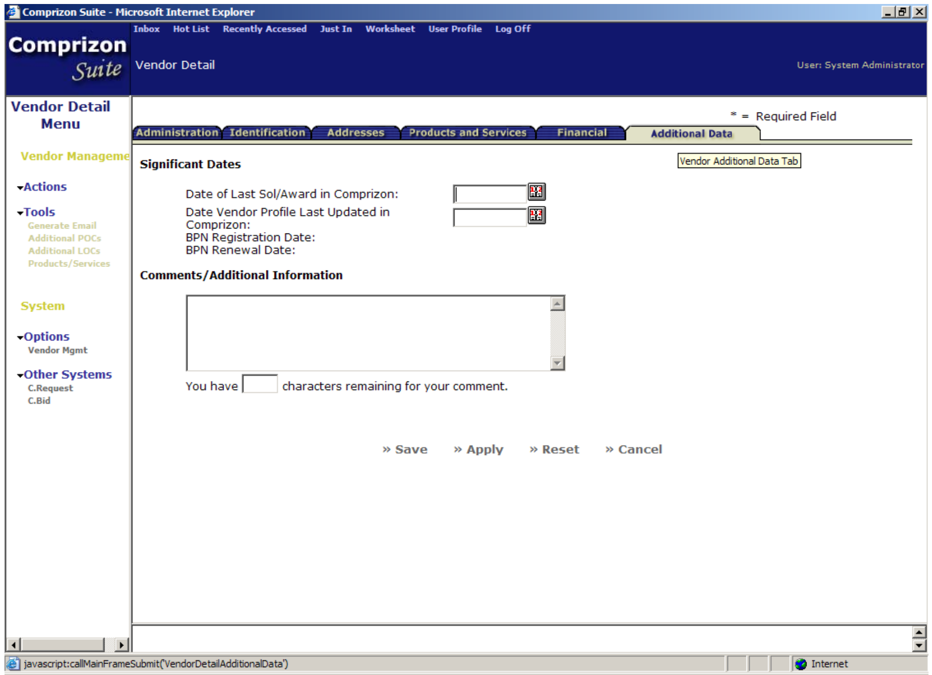

Figure 156. Vendor Other Location Detail Screen - Additional Tab

5. ***Edit Additional Locations***
   a. Select the link for that location on the Vendor Management screen. This will open the Vendor Other Location Detail screen.
   b. Make any necessary changes.
   c. Select **Save**.

6. ***Delete Additional Locations***
   a. Mark the checkbox for that location in the Mark column on the Vendor Management screen.
   b. Select **Delete** from the Actions menu.

TIP: Multiple entries can be removed simultaneously by marking the checkboxes for all of the entries you wish to remove before selecting Remove.

Table 34. Vendor Other Location Detail Screen Field Descriptions

Field	Description
Administration Tab	
Company Information.	
Vendor ID	This field is automatically generated by system.
Company Name	Enter the activity code.

Web Page URL	Enter the Web Page for this vendor.
Vendor Status	Select the Vendor Status from the drop-down list provided.
Active	Mark this checkbox if this vendor is an Active vendor.
Correspondence By	Select the method of correspondence from the drop-down list provided.
EDI Capable	Select either “Yes” or “No” from the drop-down list provided.
Matched to BPN Vendor	This field is automatically generated by system.
Matched On	If the vendor has been matched to a BPN vendor, this field displays the date the vendor was matched.
Primary Point of Contact Information	
Name	Enter the name of the Primary Point of Contact (POC) for this vendor
Tax ID No.	Enter the Tax ID No.
E-Mail Address	Enter the email address for the POC.
Phone No.	Enter the primary phone number for the POC.
Other Phone No.	Enter alternate phone number (e.g., cell phone, toll-free, etc.) for POC.
Fax No.	Enter the fax number for the POC.
POC Comments / Additional Information	Enter any comments that pertain to the POC.
Parent Company Information	
Company Name	Enter the Parent Company Name for this Vendor.
DUNS No.	Enter the DUNS No for the Parent Company.
DUNS Plus	Enter the DUNS Plus for the Parent Company.
Tax ID No	Enter the tax ID for the Parent Company.
Identification Tab	
Identification	
Duns No	Enter the DUNS No for the Vendor.
Duns Plus	Enter the DUNS Plus for the Vendor.
Tax ID No.	Enter the tax ID for the Vendor.
CEC	Enter the CEC for the Vendor.
CAGE	Enter the CAGE Code for the Vendor.
Facility Code	Enter the Facility Code for the Vendor.
SSN	Enter the SSN for the Vendor.
Type of Organization	Select the Type of Organization from the Drop Down list.
Business Types	
In this section, mark the checkboxes for all business types that apply.	
Minority Owned Business Specific Types	
If the Minority Owned Business option is selected under Business Type, then select the appropriate type of Minority Owned Business from this section.	
Addresses Tab	
Mailing Address	
Country	Select Country from the drop-down list provided.
Address Format	Select Address Format from the drop-down list provided.

Company Name	Enter Company Name for this Vendor.
Address	Enter Mailing Address Line 1 for this Vendor.
	Enter Mailing Address Line 2 for this Vendor.
City	Enter City for the Mailing Address for this Vendor.
State / Province	Enter State Code for the Mailing Address for this Vendor.
Zip / Postal Code	Enter Zip / Postal Code for the Mailing Address for this Vendor.
Copy to Payment Address	Mark this checkbox to have the system copy the Mailing Address to the Payment Address.
Payment Address	
Country	Select Country from the drop-down list provided.
Address Format	Select Address Format from the drop-down list provided.
Company Name	Enter Company Name for this Vendor.
Address	Enter Payment Address Line 1 for this Vendor.
	Enter Payment Address Line 2 for this Vendor.
City	Enter City for the Payment Address for this Vendor.
State / Province	Enter State Code for the Payment Address for this Vendor.
Zip / Postal Code	Enter Zip / Postal Code for the Payment Address for this Vendor.
Products and Services Tab	
Federal Supply Codes / Product Service (FSC / PSC) Codes	
Automatically populated as procurement actions are associated with the vendor.	
North American Industrial Classification System (NAICS) Code	
Automatically populated as procurement actions are associated with the vendor.	
Financial Tab	
Banking / Financial Information	
Banking Account Type	Select Banking Account Type from the drop-down list provided.
Financial Institution	Enter Financial Institution for this Vendor.
Routing No.	Enter Routing No. for this Vendor.
Account No.	Enter Account No. for this Vendor.
Pre-Note Date	Enter Pre-Note Date for this Vendor.
Pre-Note Verified	Enter Date Pre-Note was Verified for this Vendor.
DIS 1166	Select DIS 1166 information from the drop-down list provided.
1099 Required	Select 1099 Required option from the drop-down list provided.
Sector Type	Enter Sector Type for this Vendor.
Credit Card Payments are Accepted	Mark this checkbox if Vendor accepts Credit Card Payments.
Discount Information	
Percent Discount Terms	Enter Percent Discount Terms for this Vendor.
Number of Days for Discount	Enter Number of Days for Discount for this Vendor.
Net Due	Enter Net Due for this Vendor.
Additional Data Tab	

Date of Last Sol/Award in Comprizon	Enter the date either manually in the DD/MM/YYYY format, or use the Calendar to search for and select the date.
Date Vendor Profile Last Updated in Comprizon	Enter the date either manually in the DD/MM/YYYY format, or use the Calendar to search for and select the date.
BPN Registration Date	Displays the BPN registration date.
BPN Renewal Date	Displays the BPN renewal date.
Comments / Additional Information	Enter any additional comments or information regarding this Vendor

MANAGE PRODUCTS/SERVICES

The Products/Services option in the Tools menu on the Vendor Detail screen allows you to add additional products and/or services to a vendor.

1. Select **Vendor Mgmt** from the Vendors menu on the Purchasing / Contracting Main Menu in the C.Award module. This will open the Vendor Management screen shown in Figure 140.

2. Select the link for the vendor in the Vendor ID column. This will open the Vendor Detail screen for the vendor you selected.

3. Select **Products/Services** from the Tools menu. This will open the Vendor Products and Services screen shown in Figure 157.

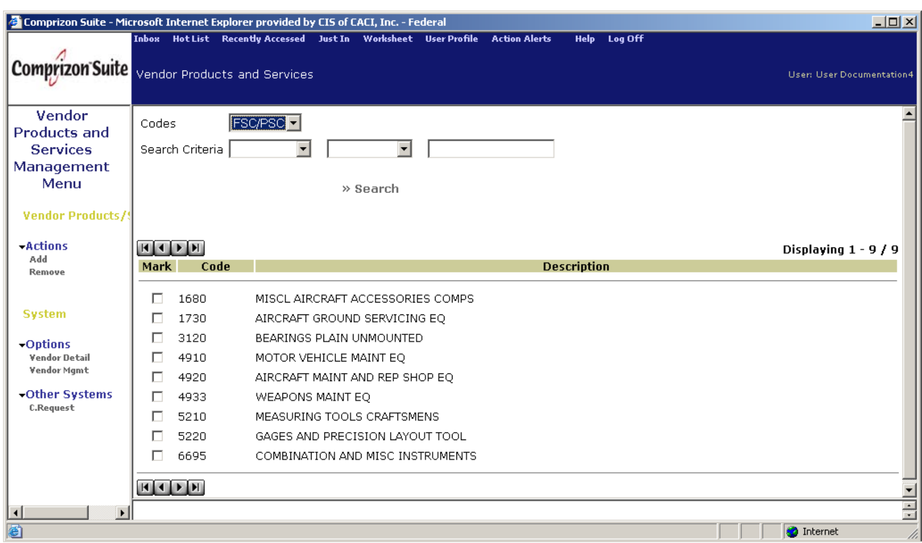

Figure 157. Vendor Products and Services Screen

4. ***To add products/services:***

   a. Select **Add** from the Vendor Products and Services screen. This will open the Assigns FSC/PSC Codes screen shown in Figure 158.

b. Mark the checkboxes for the products/services you wish to add.

c. Select **Add/Select** from the Actions menu.

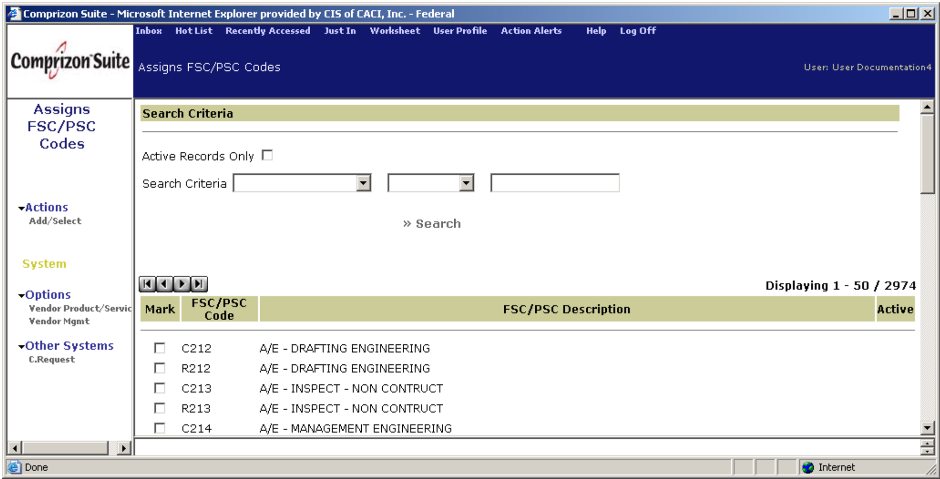

Figure 158. Assigns FSC/PSC Codes Screen

5. ***To remove products/services:***

   a. Mark the checkbox for that product or service on the Vendor Products and Services screen.

   b. Select **Remove** from the Actions menu.

TIP: Multiple entries can be removed simultaneously by marking the checkboxes for all of the entries you wish to remove before selecting Remove.

EXPORT VENDOR PAST PERFORMANCE INFORMATION

Vendor Past Performance (VPP) allows the user to complete vendor past performance evaluation for all contracts (both ComprizonSuite and non-ComprizonSuite contracts). These evaluations can be completed within ComprizonSuite or on an external website. In addition, users of ComprizonSuite can have alerts generated automatically each time an evaluation must be completed. In compliance with federal regulations to complete annual report cards for vendors, VPP data from ComprizonSuite can be sent to the government's Past Performance Information Retrieval System (PPIRS).

The following steps describe how to export VPP/PPIRS information.

1. From the Purchasing/Contracting Main menu select **System Admin** > **Export PPIRS**. This will open the Procurement Worksheet screen.
2. Select Yes to continue generating PPIRS for export.

This completes the export process. You may check the status of the export by selecting **System Admin** > **PPIRS Export** from the Purchasing/Contracting Main menu. This will open the PPIRS Export Status screen shown in Figure 159. To view details of the export, select the link in the Log File column.

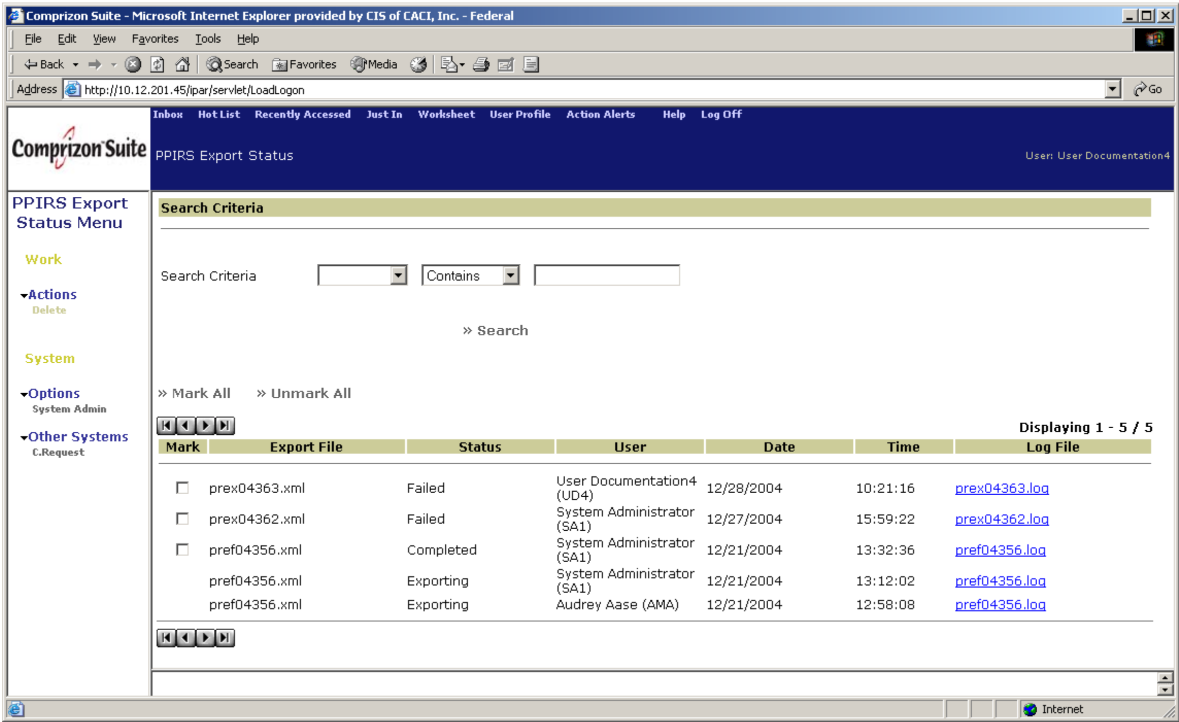

Figure 159. PPIRS Export Status Screen